

GrantVantage[®]

Applicant Instructions

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Register an Applicant Profile

1. Open a preferred web browser.
2. In the URL field of the web browser, enter the web address provided by your grant administrator. The public-facing view of the GrantVantage Portal appears.

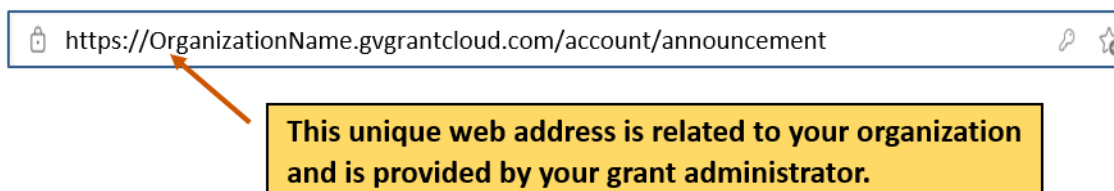


Figure 1: GrantVantage URL

3. Click **Log In** ➔. The Log In screen appears. From the Log In screen, new users must register into the system.

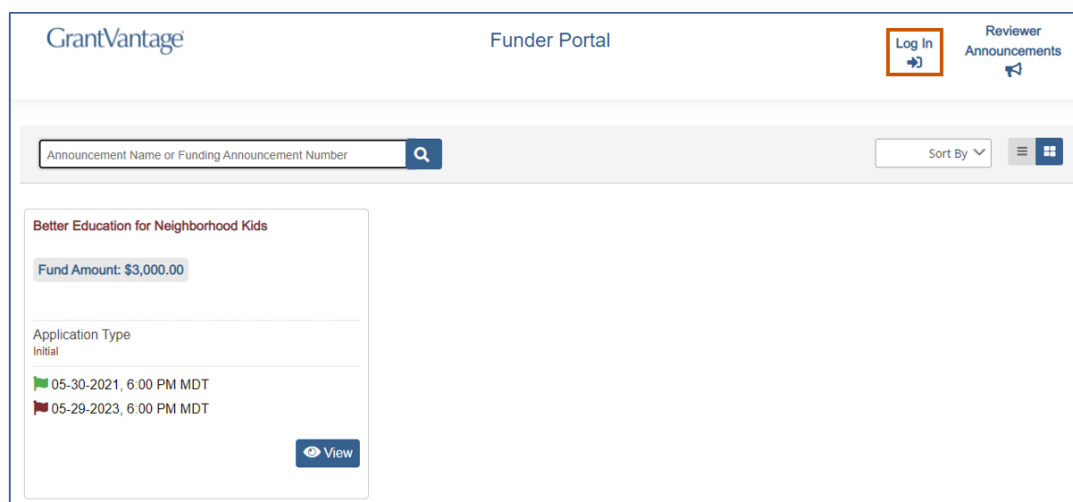


Figure 2: Public Facing Page

4. Click **Register**. You can now begin the registration process.

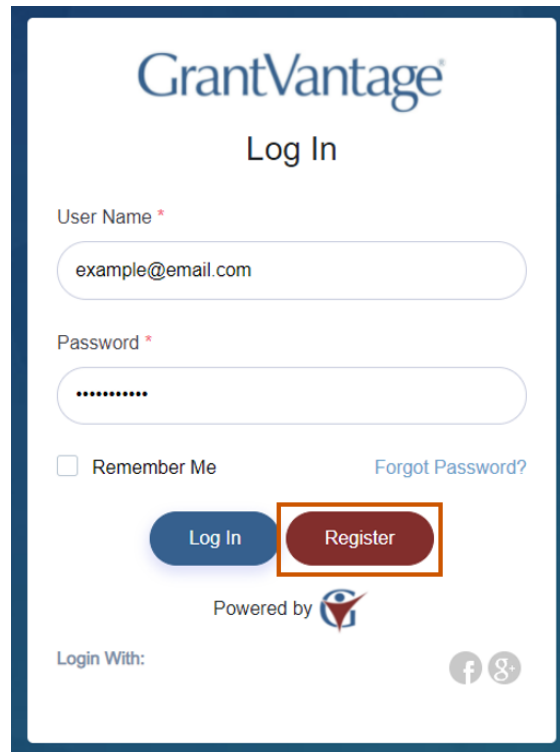

The image shows a web form for GrantVantage. At the top is the GrantVantage logo. Below it is the heading "Log In". There are two input fields: "User Name *" with the example email "example@email.com" and "Password *" with masked characters. Below the password field is a checkbox for "Remember Me" and a link for "Forgot Password?". There are two buttons: a blue "Log In" button and a red "Register" button, which is highlighted with an orange border. Below the buttons is the text "Powered by" followed by a logo. At the bottom, it says "Login With:" followed by Facebook and Google+ icons.

Figure 3: Register Profile

5. Fill in the necessary fields.
Note: The black asterisks indicate required fields.
6. Click  **Submit**. You are logged in, and the GrantVantage Funder Portal homepage appears. The homepage displays all available funding announcements. Applicants may navigate the system by using the site map.


Applicant Registration


This field is required.

This field is required.

Please prove you are not a robot

☐ I'm not a robot


reCAPTCHA
[Privacy](#) - [Terms](#)

 Cancel


 Submit

Figure 4: Applicant Registration

Login

1. Open a preferred web browser.
2. In the URL field of the web browser, enter the web address provided by your grant administrator. The public-facing view of the GrantVantage Portal appears.

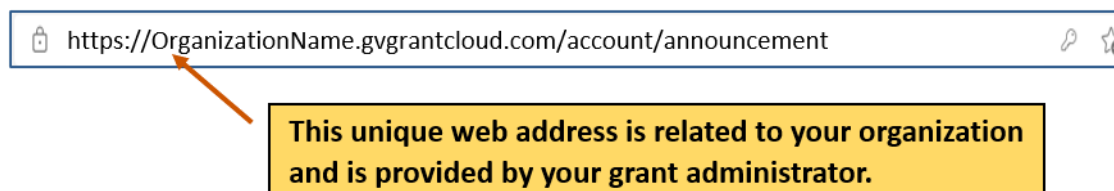


Figure 5: GrantVantage URL

3. Click **Log In** ➔. The Log In screen appears. From the Log In screen, returning users may login to the system.

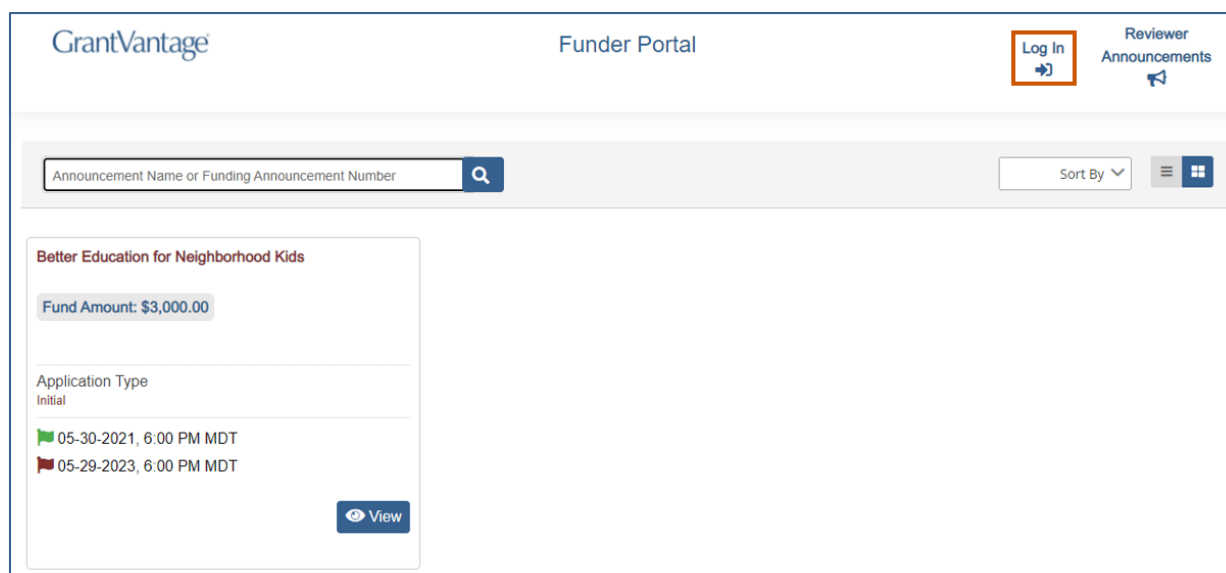
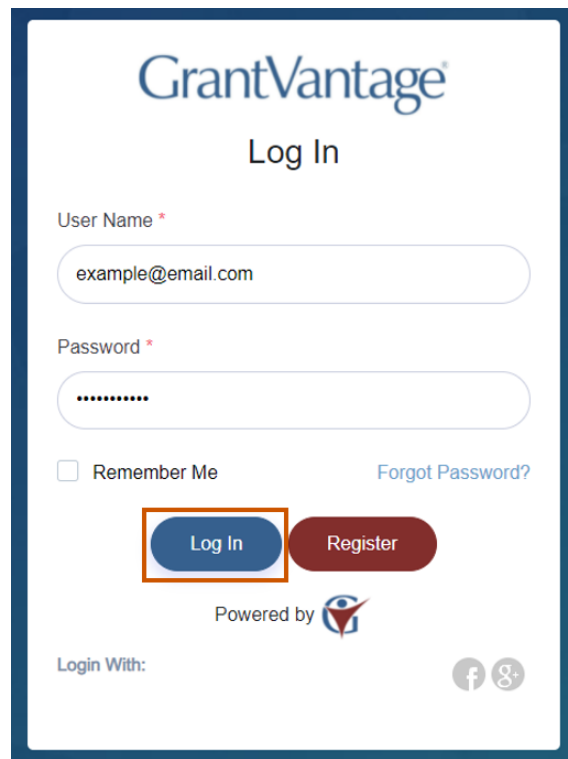


Figure 6: Public Facing Page

4. Enter login credentials and select **Log In**.



The image shows a login screen for GrantVantage. At the top is the GrantVantage logo. Below it is the text "Log In". There are two input fields: "User Name *" with the example "example@email.com" and "Password *" with masked characters. Below the password field is a checkbox for "Remember Me" and a link for "Forgot Password?". There are two buttons: "Log In" (blue) and "Register" (red). The "Log In" button is highlighted with an orange border. Below the buttons is a "Powered by" logo. At the bottom left is "Login With:" and at the bottom right are Facebook and Google+ icons.

Figure 7: Login Screen

Homepage

On the homepage, you can view all published funding announcement opportunities, opportunities you have applied for, your profile, and view users, properties, and documents related to the application.

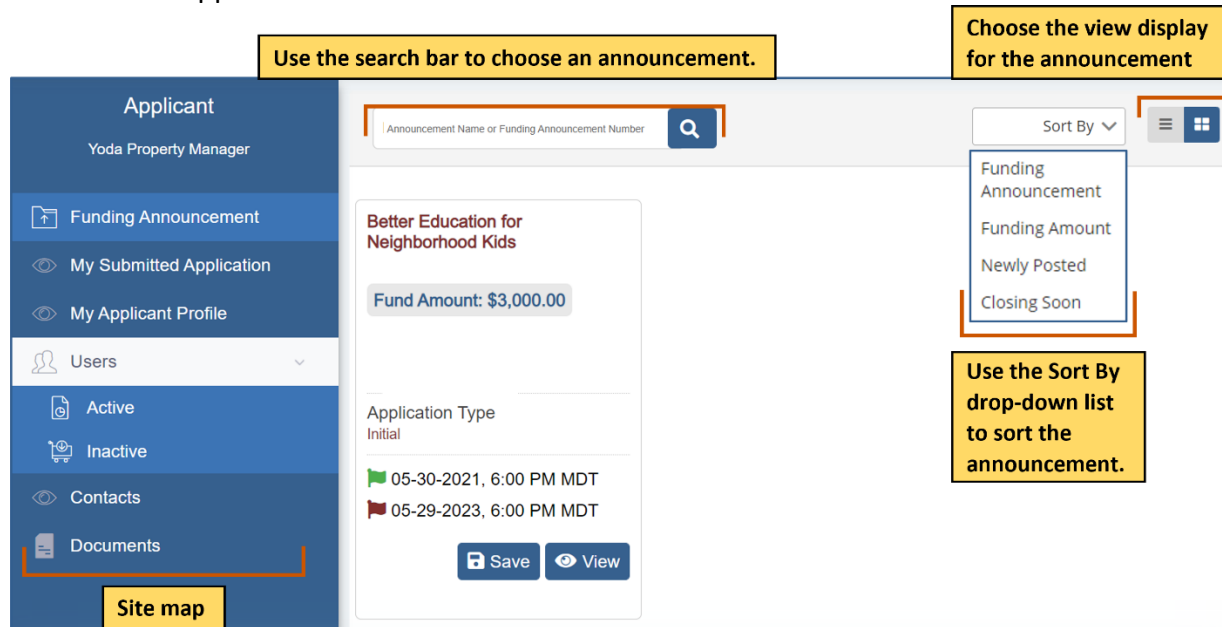


Figure 8: Homepage Screen 1

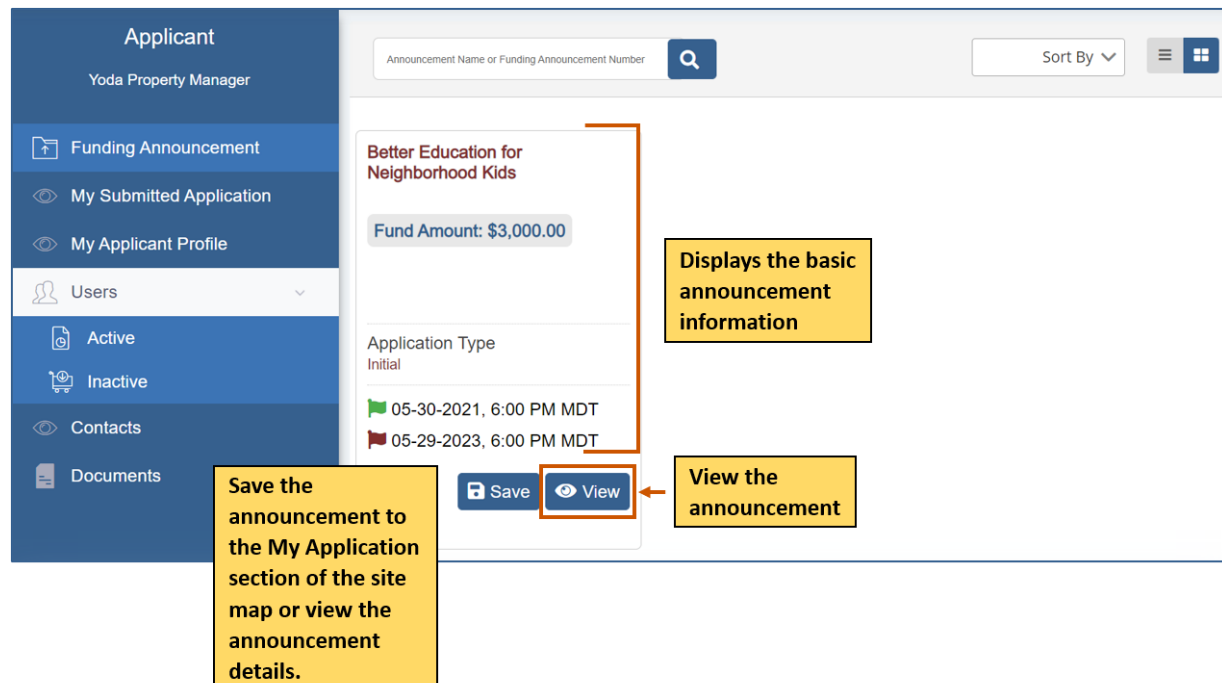


Figure 9: Homepage Screen 2

Site Map

The site map displays navigation options relating to the applicant, such as the applicant profile, the internal users, and the contacts. The Applicant site map links to the Funding Announcement and My Applications pages, which opens the applicant dashboards.

















Applicant		Site Map Options	Description	
Yoda Property Manager				
	Funding Announcement		Displays all published announcements.	
	My Submitted Application			Displays all the announcements you have saved and/or applied to.
	My Applicant Profile			View your Applicant Profile. You can add additional documents and relevant information such as a professional CV or other certifications related to the applicant or entity’s qualifications.
	Users			
	Active			
	Inactive			
	Contacts			
	Documents			
		Users		
			View the active users related to the application.	
			View the active users related to the application.	
			View the contacts related to the application.	
			View documents related to the application.	

Table 1: Site Map

Funding Announcement

You can view announcements you have saved/applied to, your applicant profile, users and contacts associated with the Applicant profile or organization profile, and documents related to the funding announcement or an applicant document library that houses documents submitted with an application.



Figure 10: Funding Announcement Screen 1

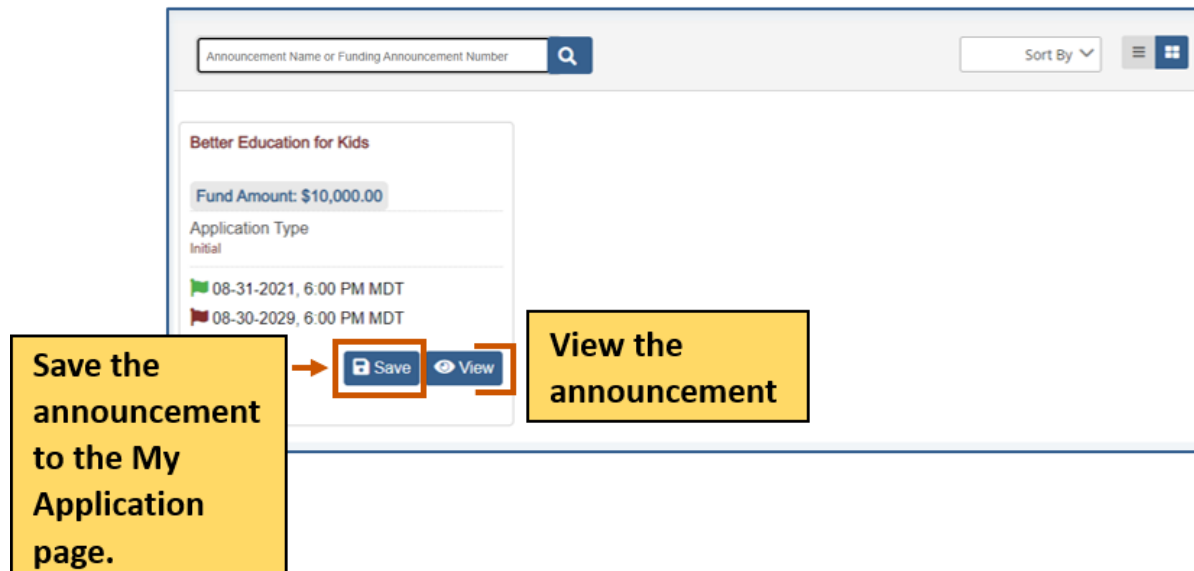



Figure 11: Funding Announcement Screen 2

Save an Announcement

1. From the site map, click  **Funding Announcement**. The Funding Opportunity for Applicant page appears.



Figure 12: Site Map – Funding Announcement

2. **Optional:** Use the search bar to find an announcement.
3. Click  **Save** to save the announcement to the My Application sitemap section. A green Application Saved Successfully popup appears at the bottom right of the screen.

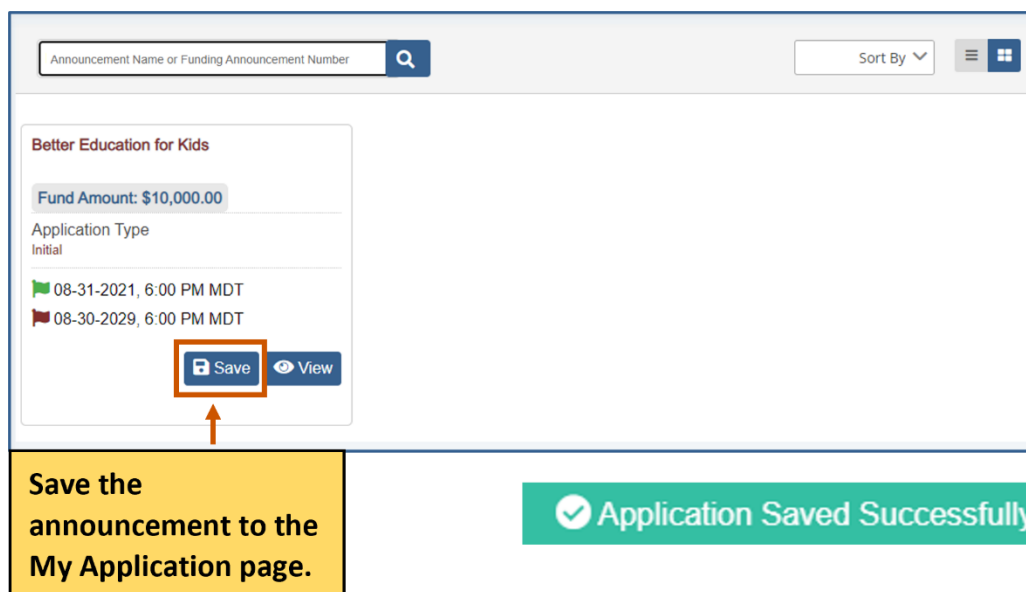


Figure 13: Save Announcement

Print the Announcement as a PDF

1. Click  **Print PDF**. The announcement details download as a PDF.




Figure 14: Print PDF Funding Announcement

View Attachments associated with the Announcement

1. Click  **Attachments**. The Attachments dialog box appears.



Figure 15: View Attachments

2. **Optional:** Click the link to view the document.
Or
Click **Download**  to download the attachment. The attachment is downloaded.

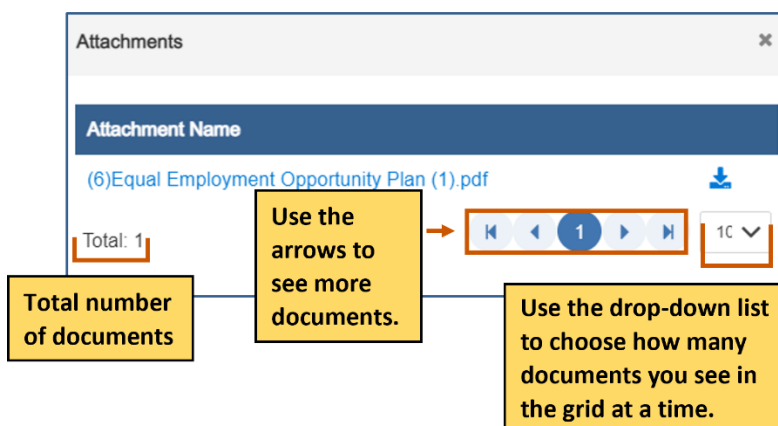


Figure 16: Attachments Dialog Box 1

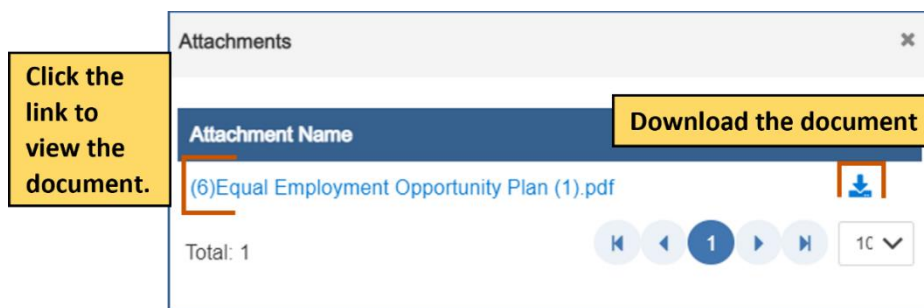



Figure 17: Attachments Dialog Box 2

Submitting an Application

1. Click  **View** next to the announcement you wish to view. The Funding Announcement Narrative appears.

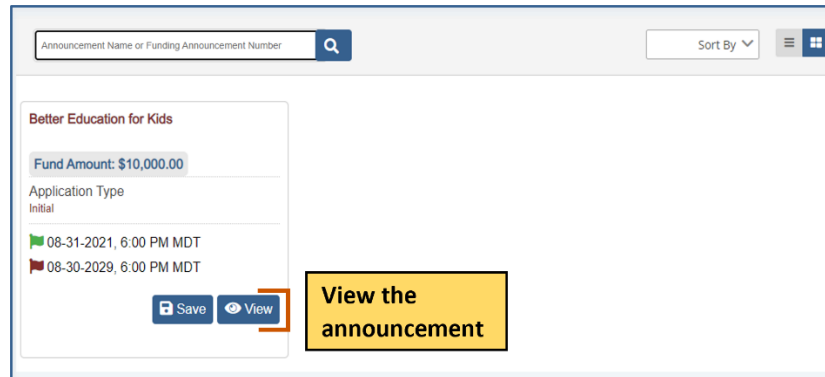


Figure 18: View Announcement

2. Click  **Apply**. The Application Details dialog box appears.



Figure 19: Apply to Announcement

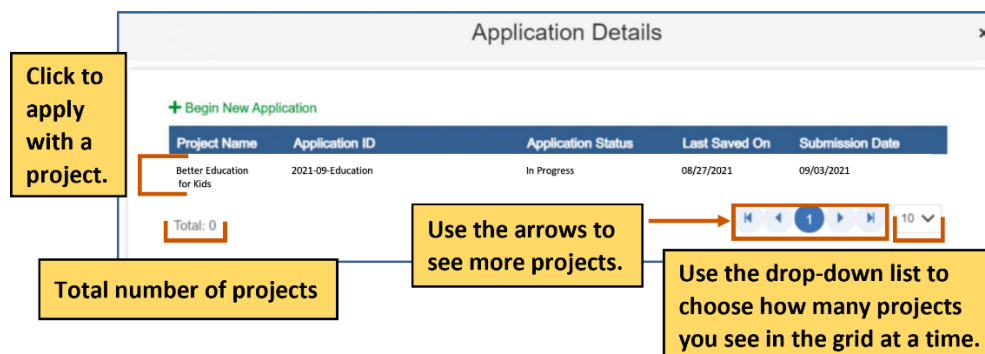
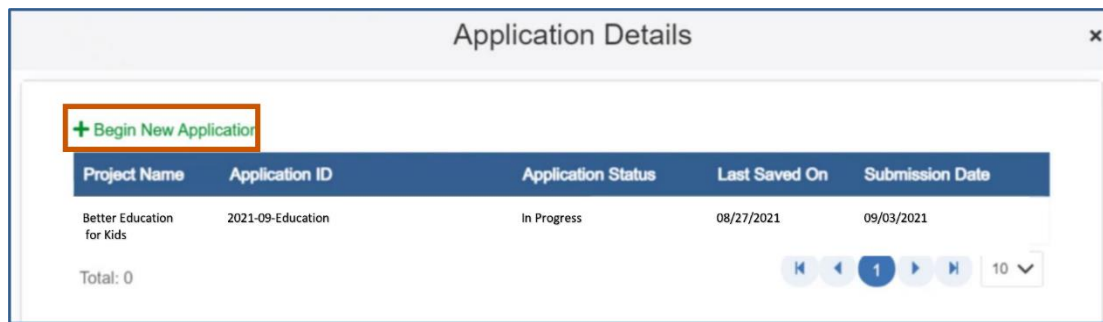



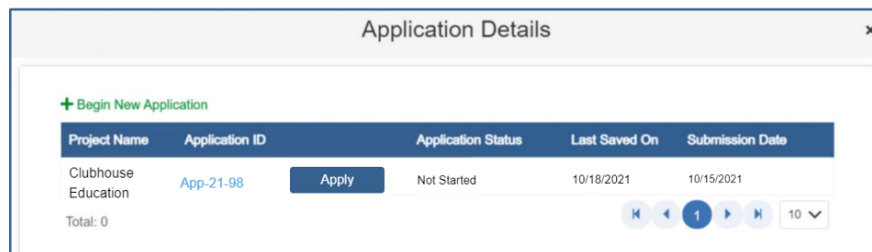
Figure 20: Application Details Dialog Box

3. Click  **Begin New Application**. The New Application dialog box appears.

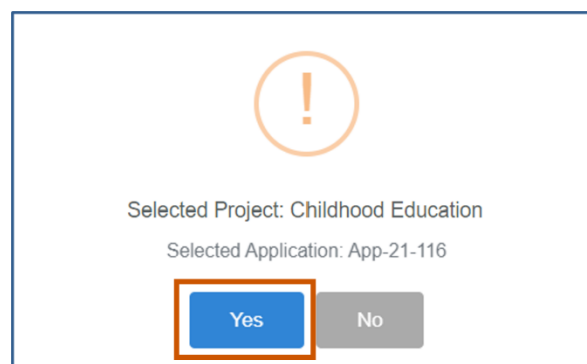
*Figure 21: Begin New Application*

4. Enter a project name.
5. Click  **Save**. The project appears in the grid.

The screenshot shows a "New Application" dialog box. It has a title bar with "New Application" and a close button (X). Inside, there is a "Project Name*" label and a text input field containing "Clubhouse Education". At the bottom right, there are two buttons: "Save" (with a pencil icon) and "Close". The "Save" button is highlighted with a red box.

*Figure 22: New Application Dialog Box*

6. Click **Apply**. A warning popup appears telling you which project you are applying with.

*Figure 23: Warning Choose Project*

7. Click **Yes**. Another popup appears telling you the application is about to begin.

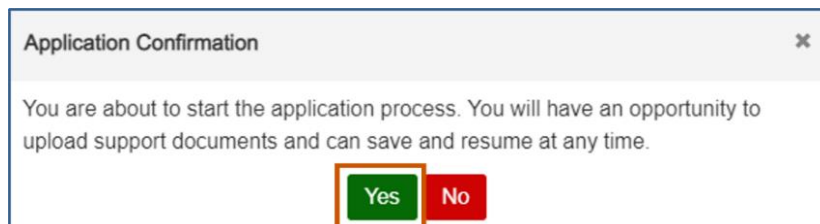


Figure 24: Application Confirmation Dialog Box

8. Click **Yes**. The application process begins.
9. Answer all the questions and complete the templates. Not all applications have an Objective or Budget Template. Each tab needs to be completed before submission. Swap between the tabs to complete them in any order.
- Note:** Once you complete a tab item, the red x next to the name turns into a green checkmark. Make sure all questions are complete.

Application Questions:

- a. **Optional:** Use the hamburger menu to see all the questions.

Tip: The questions are color-coded to indicate the completion process.

- **Blue** – The question is in progress.
- **Gray** – The question needs to be viewed.
- **Green** – The question is complete.

Complete the tabs in any order. Once you have completed a tab item, the red x turns into a green checkmark.

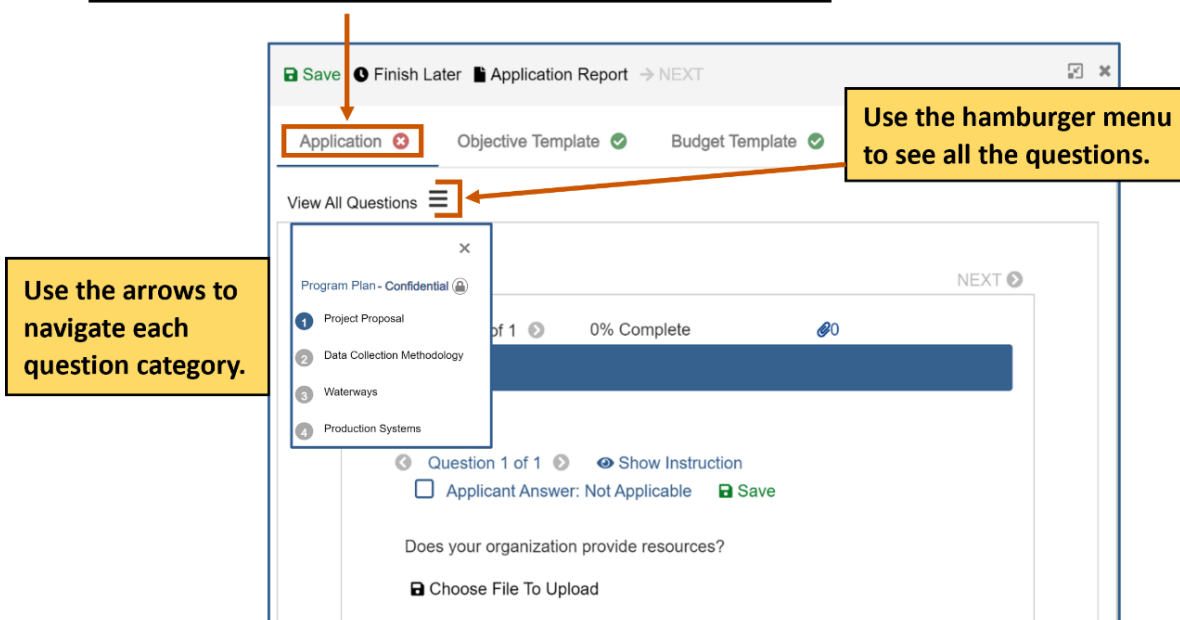


Figure 25: Use Hamburger Menu

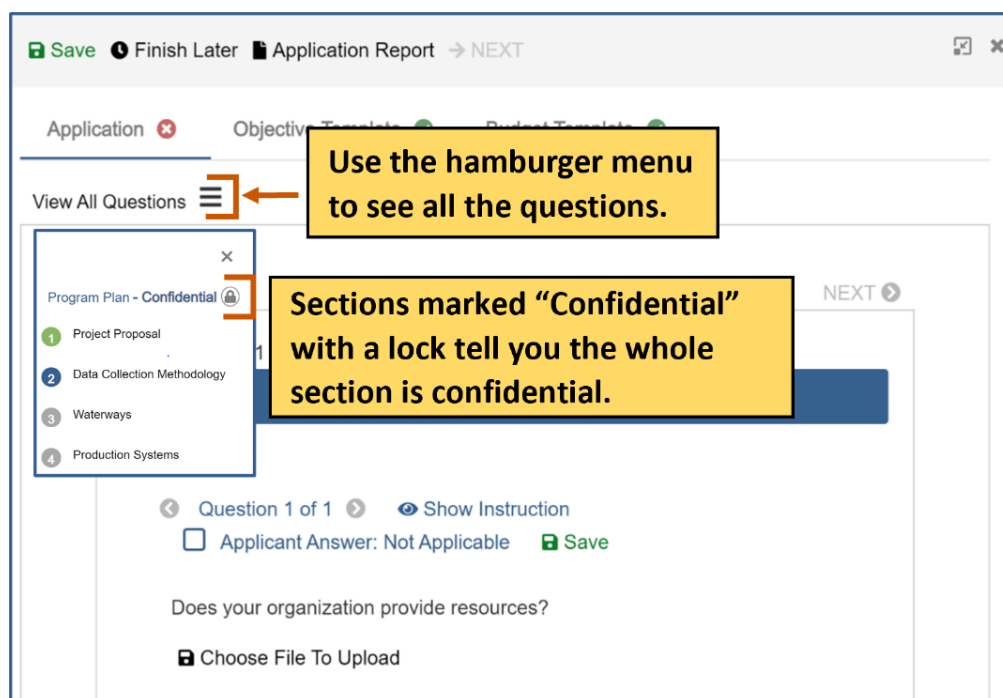


Figure 26: Hamburger Menu Status

- b. Use the arrows to navigate the questions.

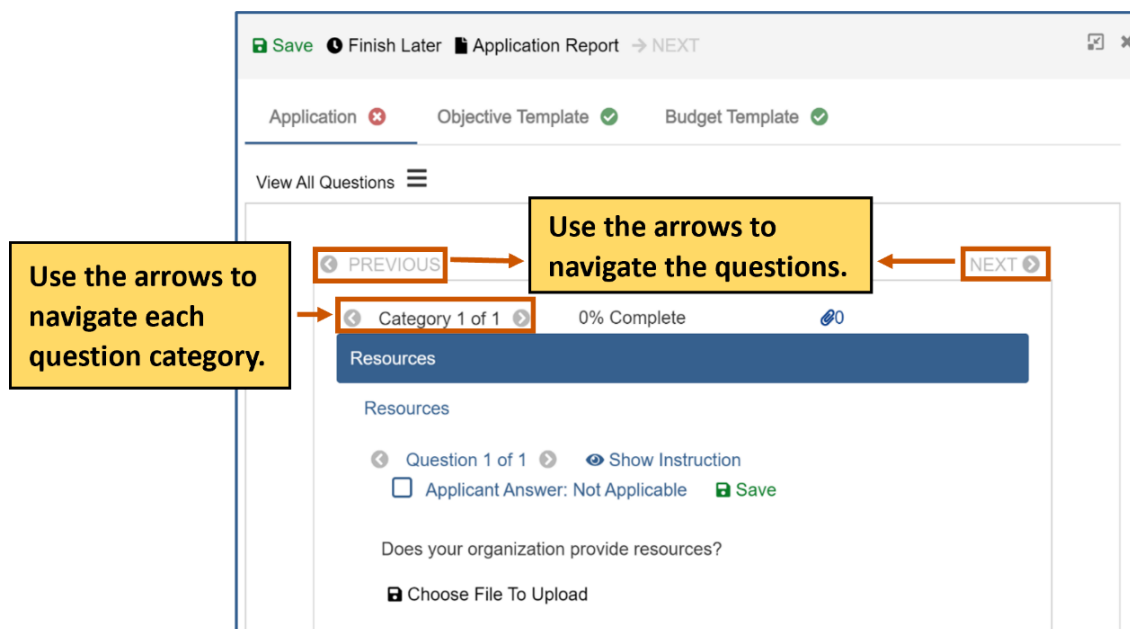


Figure 27: Use Arrows through Questions

Note: If you are an Applicant Delegate – Standard user, you cannot view the confidential section and questions. Therefore, you cannot complete the submission process.

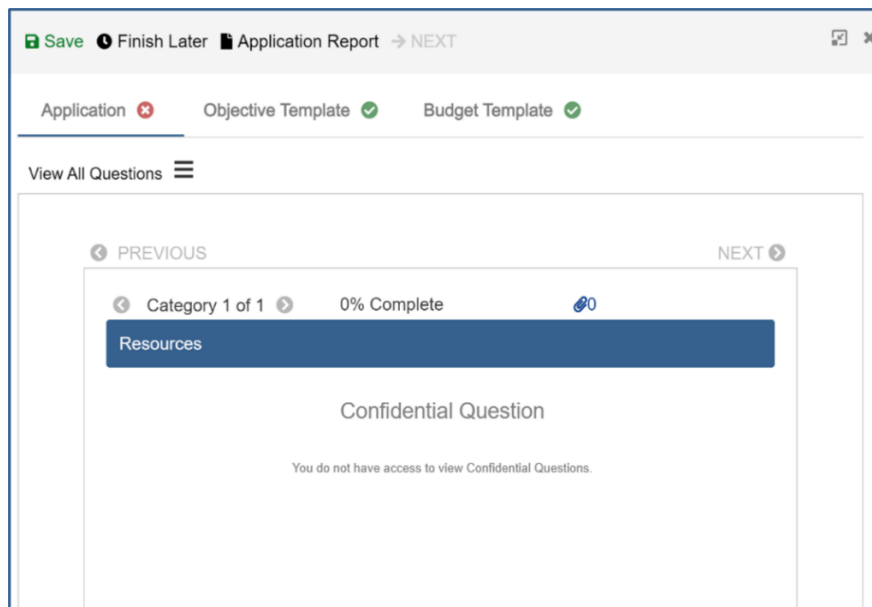



Figure 28: No Access to Confidential Section

- c. Complete the question and click  Save or a navigation arrow to save the question. For more information, see [Applicant Question Types](#).
- Note:** If a question requires additional information, the answer will not save until the required fields are answered. You are required to have a 100% completion before you can submit the application.

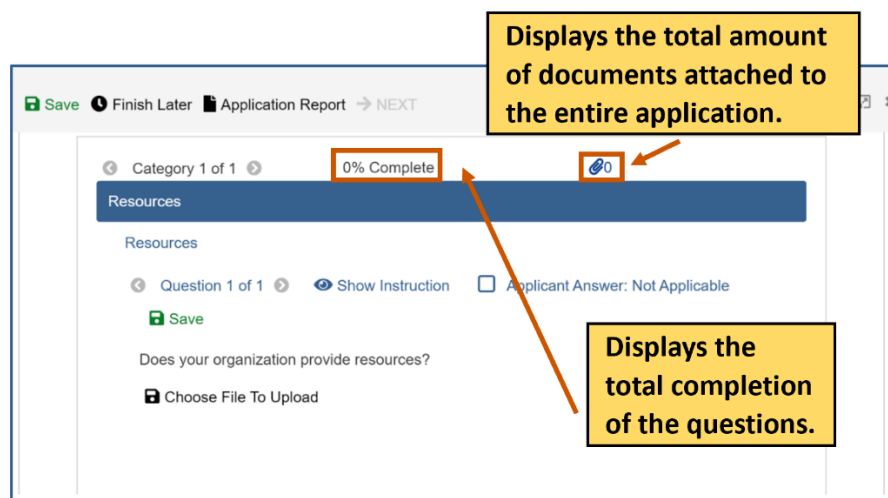



Figure 29: Question Completion

Narrative fields may have a character limit that will display the maximum number of characters an applicant response may contain. The character limit will count down until it reaches zero (0), and the system will not allow you to continue typing. If there is no character limit it will be indicated by a double dash (--).

- d. **Optional:** If the question requires you to attach a document, attach it to the question.
- i. Click  **Choose File To Upload**. The Documents dialog box appears.

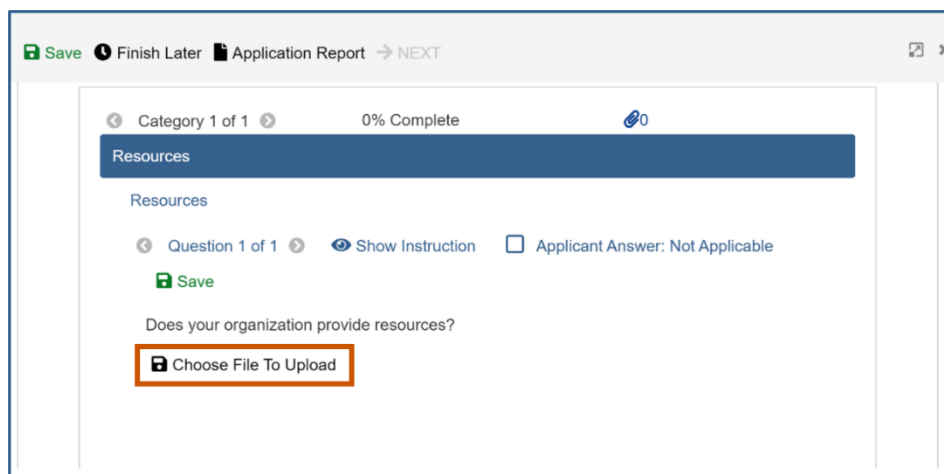


Figure 30: Add Attachment to Question

- ii. Choose from the picklist.

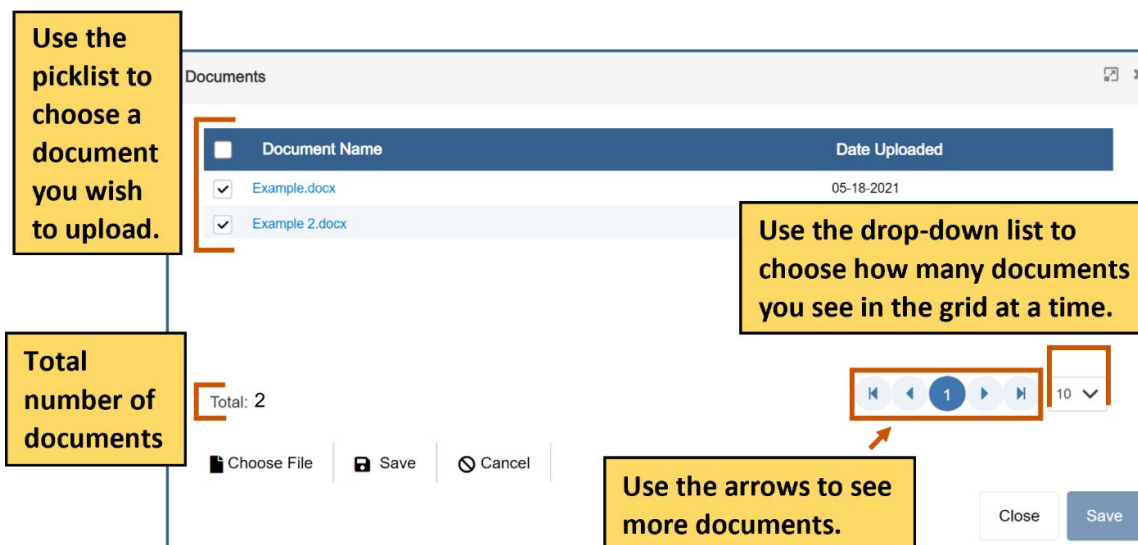





Figure 31: Choose Attachment for Question

Or

- i. Upload a new document by clicking **Choose File** .
- ii. **Upload the document.**
- iii. Click **Save** .
- iv. Click **Save**. The document is attached to the question.

 **Note:** Confidential documents have a lock indicator. They can only be attached to a confidential question.

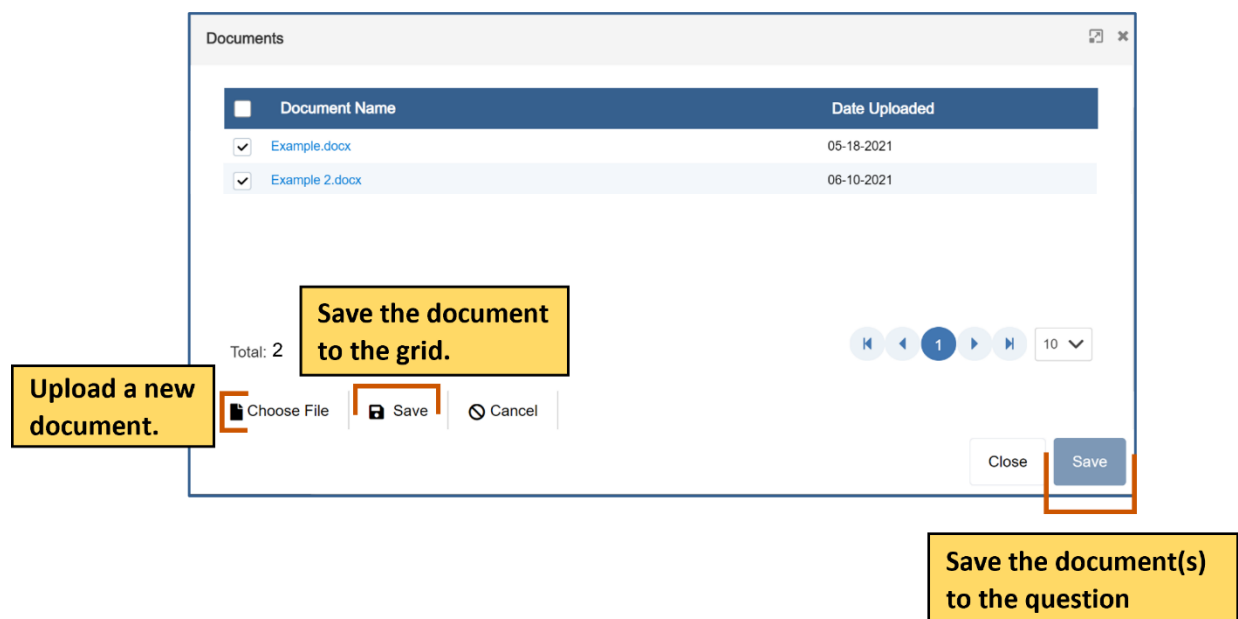


Figure 32: Upload Attachment

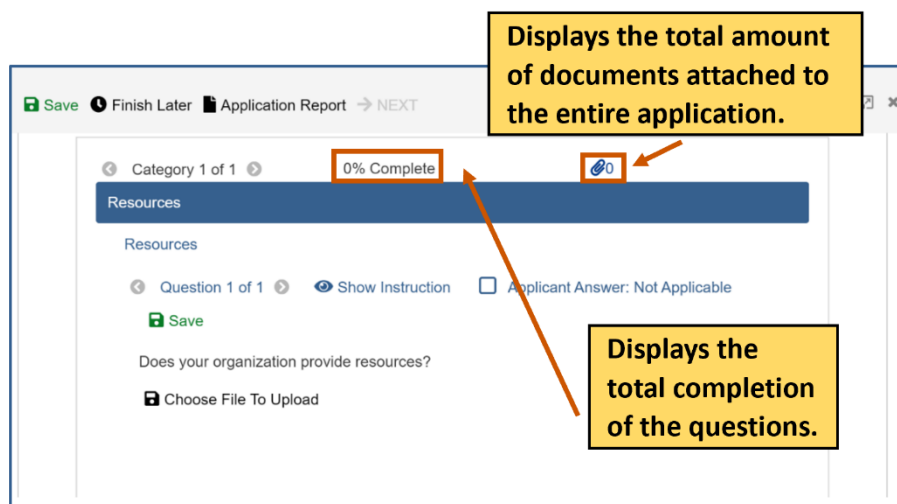


Figure 33: Question Completion

Optional: Complete the Objective Template:

- Note:** The funding announcement can be published without using the Objective Template. Objective Templates can be left blank for you to complete entirely.
- Click the Objective Template tab. The Objectives template appears.

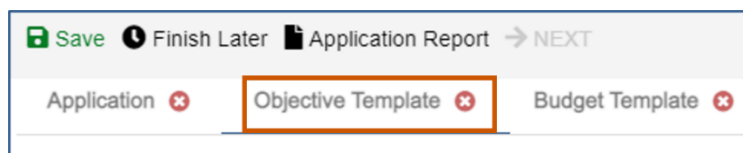


Figure 34: Complete Objective Template

- b. Click Objective Instructions to see how to complete the template. The Objective Instructions dialog box appears.

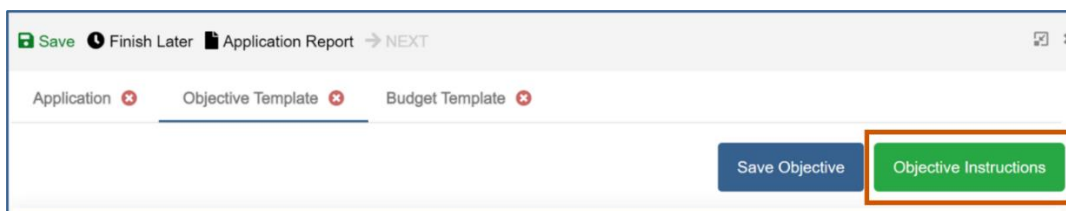


Figure 35: View Objective Instructions





- c. Click **Maximize**  to maximize the window.
Or
Click **Close**  to close the dialog box.



Figure 36: Maximize or Save Objective Instructions

- d. Add in the goals if necessary. If goals are required, each objective must be associated with a goal.
 **Note:** The Goal radio button only appears if the option has been selected when the announcement was made.
- e. Add in the objectives, performance measures, and grant activities.
 **Note:** The performance measures and grant activities must be associated with an objective. For more information on how to add, edit, or delete a goal, objective, performance measure, or grant activity, see [Objective Tools](#).

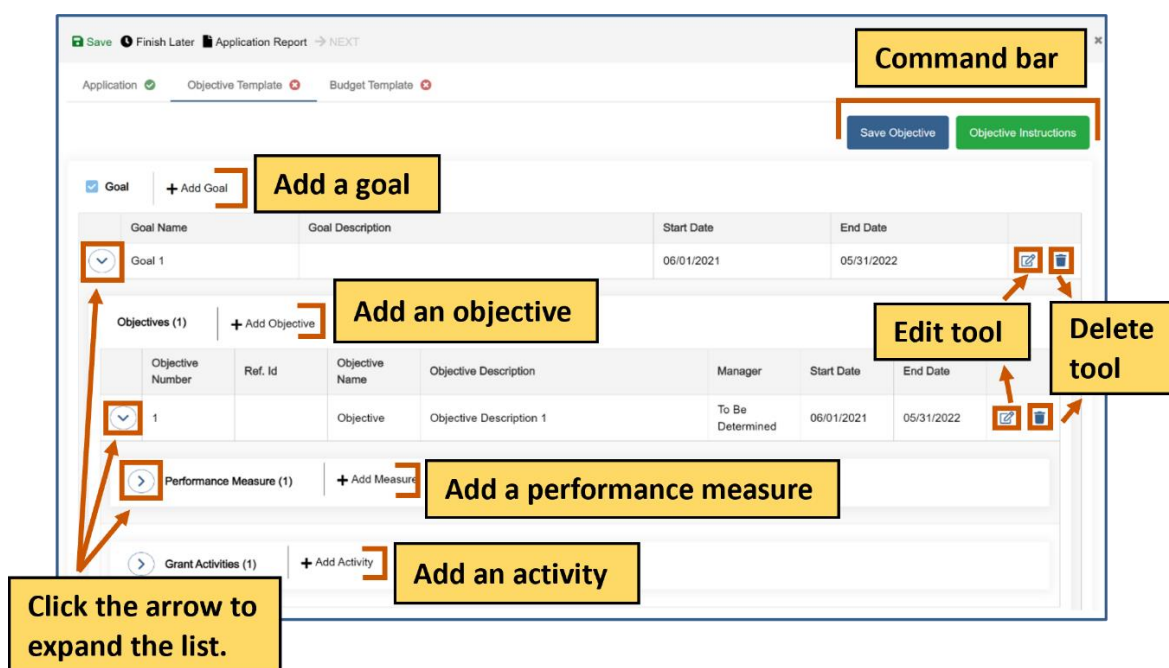


Figure 37: Objective Template

Objective Template Command Bar	Description
Save Objective	Saves the objectives and locks the Objective Template.
Objective Instructions	Display the instructions on how to complete the Objective Template.

Table 2: Objective Command Bar

- f. Click **Save Objective**. The Objective Template is saved and locked. The objectives must be saved and locked before you can submit the application.

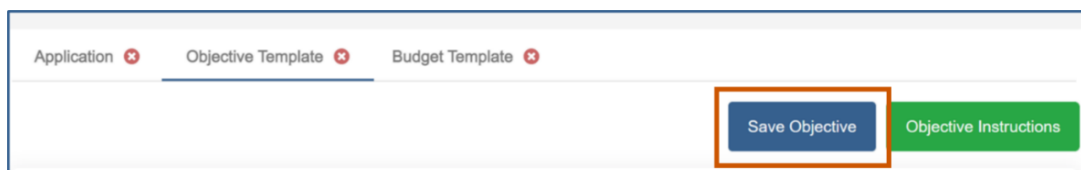


Figure 38: Save Objective Template

- g. **Optional:** You can unlock the Objective Template again if you need to make changes.
- i. Click **Return to Draft**. The Objective Template is locked, and you can edit it. You can go in and out of draft during the application process.

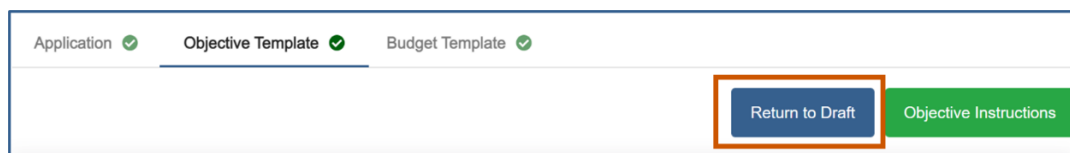


Figure 39: Return Objective Template to Draft

Complete the Budget template.

Note: There are different design setups for the budget. The items you can add/change depend on the properties selected when the announcement was made. For more information, see [Budget Tools](#). If there is no budget, you will be required to input a "Requested Amount" on the final page of the application. The budget template can be left blank so you can input a custom budget.

- a. Click the Budget Template tab. The Budget Template appears.

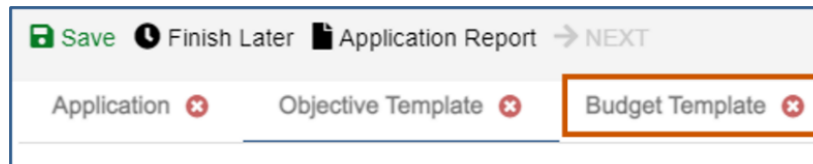


Figure 40: Complete Budget Template

- b. Use the Budget Year drop-down list to choose a budget year.
- c. Click **Budget Instructions** to view the instructions on how to complete the Budget Template.

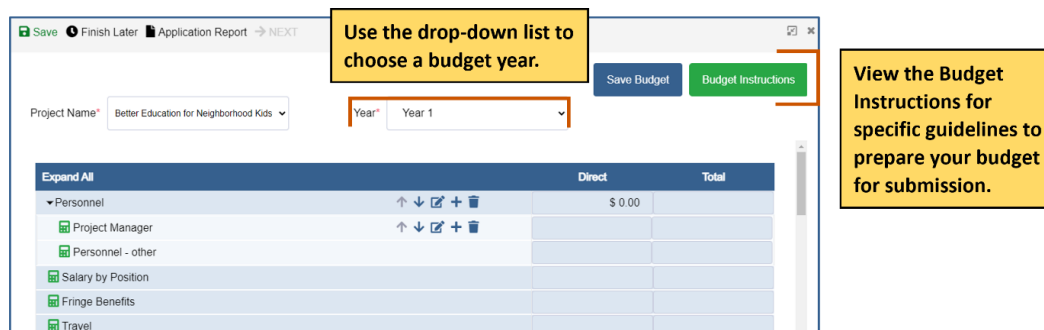


Figure 41: Budget Options

- d. Use the budget tools to add, edit delete parent categories, sub-categories, or sub-sub-categories.
- e. **Optional:** Type in money amounts for each budget category.

Note: The Cash Match, In-Kind Match, and Leveraged columns may be hidden depending on the announcement configuration.

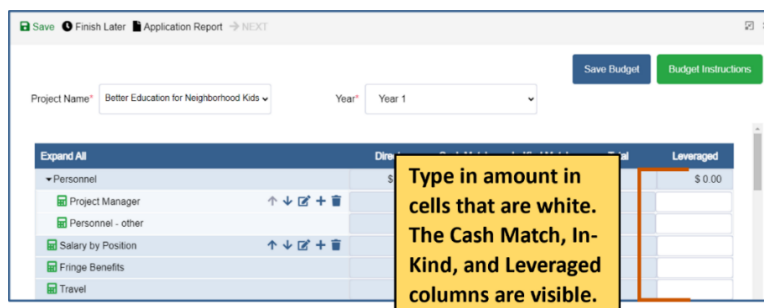


Figure 42: Columns Shown

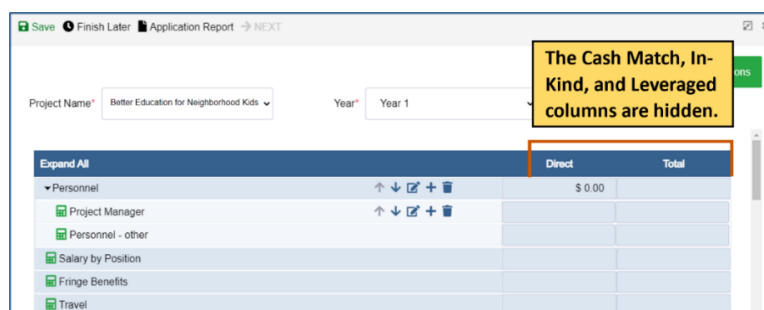


Figure 43: Columns Hidden

If you can complete budget calculations and/or narratives, a green **Budget Justification** icon appears on the line-item. Otherwise, you are not able to do this task.

- f. **Optional: Single-click Budget Justification** in the line-item next to a category to show budget calculations and/or the budget narrative. The Budget Justification dialog box appears.

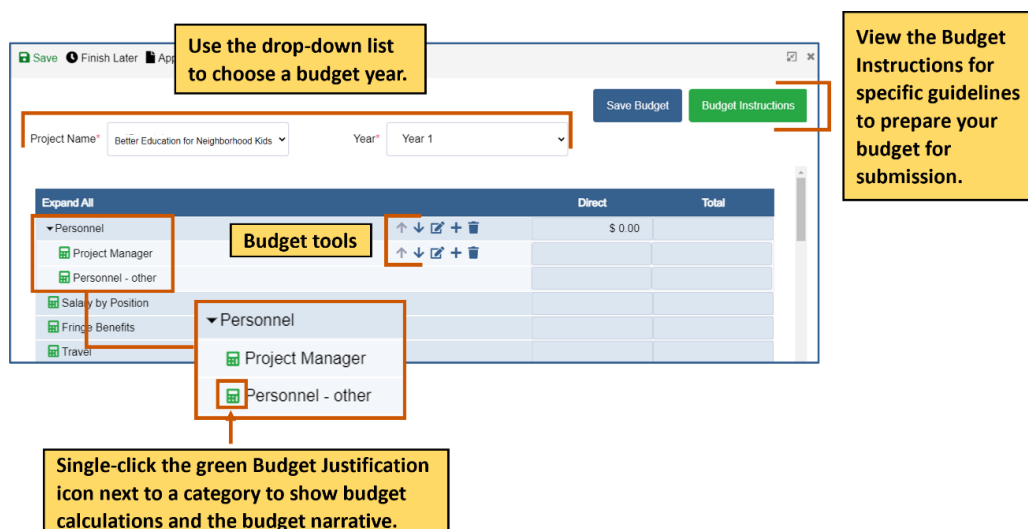




Figure 44: Budget Tools

- g. Fill in the necessary fields.

 **Note:** The red asterisks indicate required fields.

- h. Click  **Save** to save the calculation. Repeat steps f – h for each budget calculation and/or narrative. For more information, see [Budget Calculation/Narrative Tools](#).

Tip: If you need to delete an entry from the grid, click  **Delete Entry**. The calculation and/or narrative disappears from the grid.

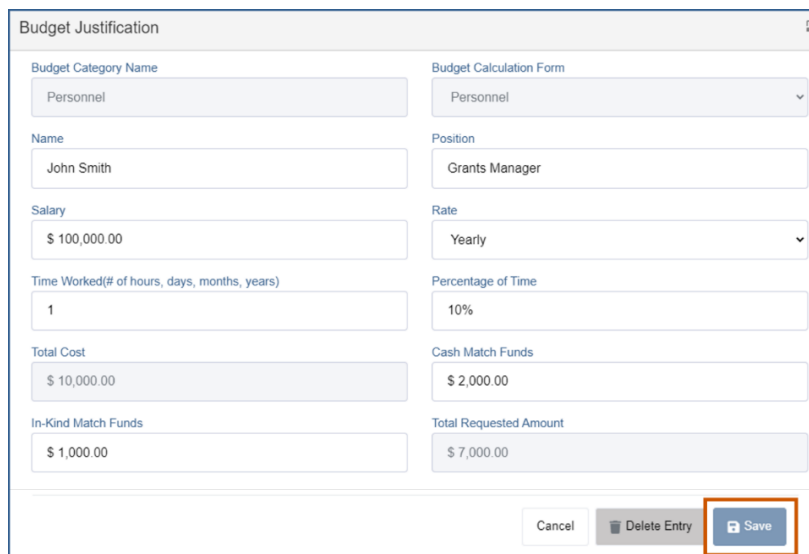


Figure 45: Save Calculation/Narrative

- i. Click **Save Budget**. The Budget template is saved and locked. The budget must be saved and locked before you can submit the application.

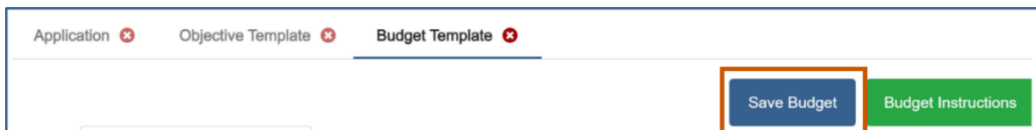


Figure 46: Save Budget Template

- j. **Optional:** You can unlock the Budget Template again if you need to make change.
- i. Click **Return to Draft**. The Budget Template is locked, and you can edit it. You can go in and out of draft during the application process.

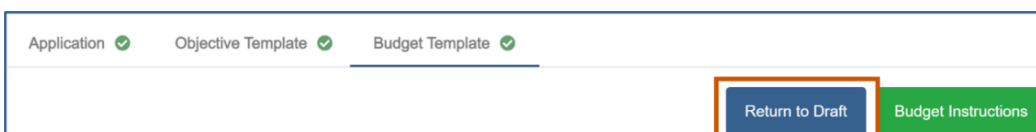


Figure 47: Return Budget Template to Draft

Finish the application process

10. Once the questions and the templates are saved and locked, click ➔ **Next**. A popup appears confirming you have reviewed your answers.



Figure 48: Finish Application Process

11. Click **Save & Continue**.

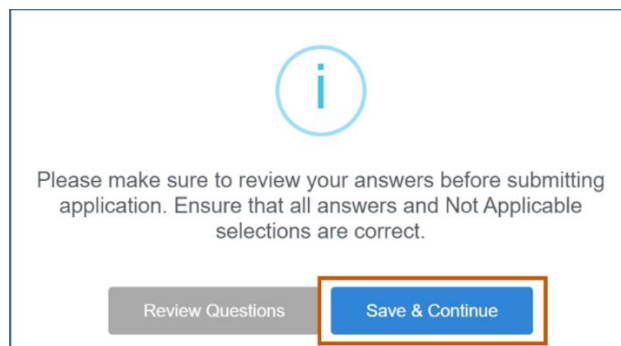



Figure 49: Warning to Check Questions

12. Fill in the necessary fields.

 **Note:** The red asterisks indicate required fields.

A screenshot of a web form titled 'Project Information'. At the top is a navigation bar with 'Save', 'Finish Later', 'Application Report', 'PREVIOUS', and 'Finish' buttons. The form has several sections: 'Provide Project Name *' with a text input field; 'Requested Amount' with a text input field containing '\$ 500.00'; 'Project Summary *' with a text area; and four search fields for 'Authorized Certifying Official', 'Project Director/Manager', 'Project Manager/Coordinator', and 'Compliance/Fiscal Officer'. Each search field has a magnifying glass icon, a red 'X' icon, and a plus icon. A yellow callout box with a black border points to the 'Requested Amount' field and contains the text: 'This field is only grayed-out there is a budget template. If there is no budget template, the field will be white and allow a dollar amount entry.'

Figure 50: Project Information

13. Click ►► **Finish**. The Submission page appears telling you how to go back and review your answers, how to view the application report, how to save and resume the application later, and how to submit the application.

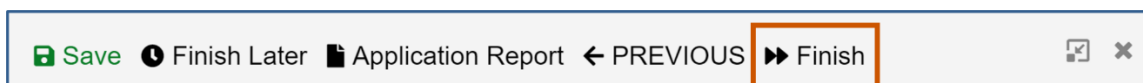



Figure 51: Go to Submission Page

14. Click  **Submit**. A popup appears asking if you are sure you want to submit the application.

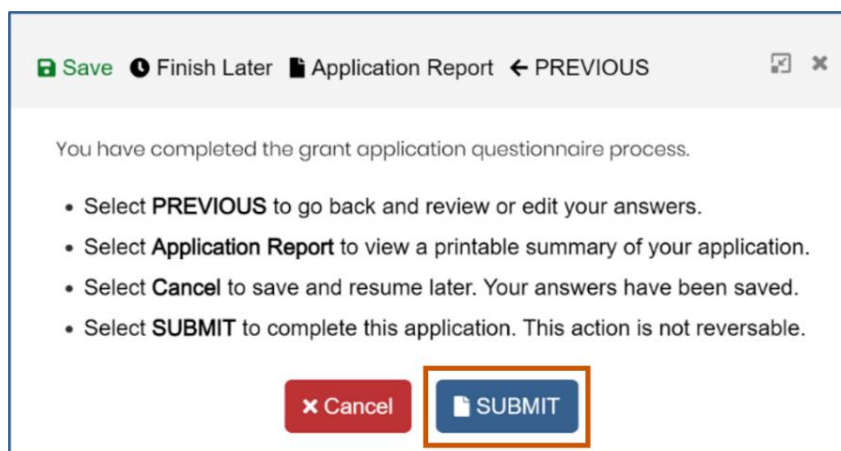


Figure 52: Submit Application

15. Click **Yes**. The application will be submitted.

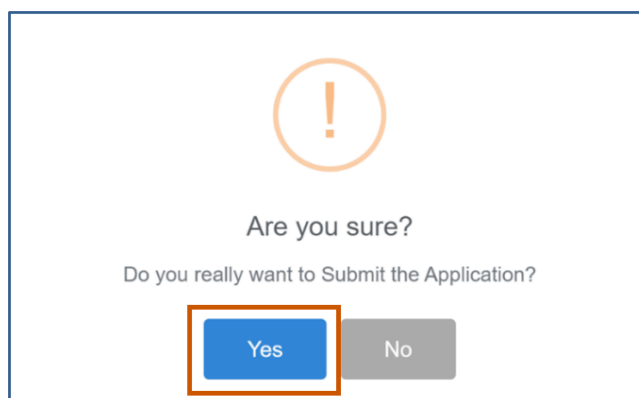


Figure 53: Warning to Submit Application

The Submit button turns into Processing with a spinning wheel. The Save button at the top also has a spinning wheel. Wait until the application has been submitted. There is a green checkmark next to the announcement indicating you have applied. A blue information popup also appears indicating that the application was submitted successfully.

Saving... Finish Later Application Report ← PREVIOUS

You have completed the grant application questionnaire process.

- Select **PREVIOUS** to go back and review or edit your answers.
- Select **Application Report** to view a printable summary of your application.
- Select **Cancel** to save and resume later. Your answers have been saved.
- Select **SUBMIT** to complete this application. This action is not reversible.

Cancel **Processing...**

↓

Better Education for Kids ✓

Fund Amount: \$10,000.00

Application Type
Initial

08-31-2021, 6:00 PM MDT
08-30-2029, 6:00 PM MDT

View

Submitted Successfully

Figure 54: Submit Successful

My Submitted Application

View all the announcements you have applied to. You can view the application report, the objective report, and the budget report.

Click the blue arrow to show the application, objective, and budget reports. Click the red arrow to collapse the report list.

My Submitted Application

Search...

Q

Project Name	Announcement	Submitted Date	Amount Requested	Status	Award/Denial Date	Awarded Amount
Clubhouse Education	Better Education for Neighborhood Kids	10/15/2021	\$84,500.00	SUBMITTED	-	\$0.00

Report Name

Report Type

Report Creation Date

Application Report

Original Application Report

10/15/2021

Objective Report

Original Objective Report

10/15/2021

Budget Report

Original Budget Report

10/15/2021

Total: 1

⏮

⏪

1

⏩

⏭

10

▼

Figure 55: My Submitted Application Screen

View Reports

- From the site map, click  **My Submitted Application**. The Funding Opportunity for Applicant page appears.

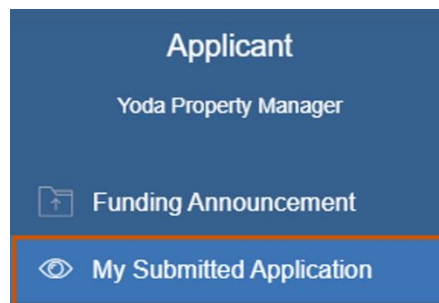


Figure 56: My Site – My Submitted Application

- Click the blue arrow to show the application, objective, and budget reports.

Click the blue arrow to show the application, objective, and budget reports. Click the red arrow to collapse the report list.

My Submitted Application						
Search...						
Project Name	Announcement	Submitted Date	Amount Requested	Status	Award/Denial Date	Awarded Amount
Clubhouse Education	Better Education for Neighborhood Kids	10/15/2021	\$84,500.00	SUBMITTED	-	\$0.00
Report Name						
Report Type						
Report Creation Date						
Application Report						
Original Application Report						
10/15/2021						
Objective Report						
Original Objective Report						
10/15/2021						
Budget Report						
Original Budget Report						
10/15/2021						
Total: 1						

Figure 57: My Submitted Application Screen

- Click the link to one of the reports. The appropriate report appears.

My Submitted Application						
Search...						
Project Name	Announcement	Submitted Date	Amount Requested	Status	Award/Denial Date	Awarded Amount
Clubhouse Education	Better Education for Neighborhood Kids	10/15/2021	\$84,500.00	SUBMITTED	-	\$0.00
Report Name						
Report Type						
Report Creation Date						
Application Report						
Original Application Report						
10/15/2021						
Objective Report						
Original Objective Report						
10/15/2021						
Budget Report						
Original Budget Report						
10/15/2021						
Total: 1						

Figure 58: Click Link to Report

My Applicant Profile

Once an applicant has created a user account, they may navigate to their Applicant Profile. The Applicant Profile and related pages are a fully customizable tool to enhance the user's applications. *My Applicant Profile* is a tool designed to enhance a user's application. Here, applicants may add additional documents and relevant information such as a professional CV or other certifications related to the applicant or entity's qualifications. All applicant users must upload their documents to their User Profile before they begin a funding announcement application. Applicant's will not be able to upload documents directly to the application. Instead, the system will look to the user's profile.

1. From the site map, click  **My Applicant Profile**. The Applicant Profile page appears.

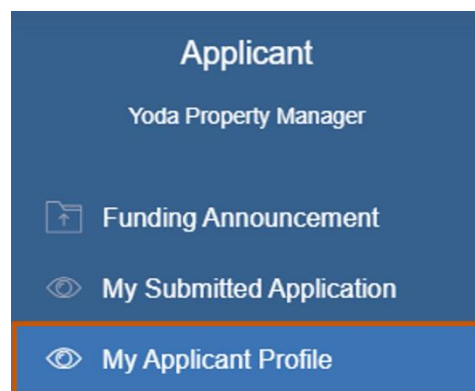



Figure 59: Site Map – My Applicant Profile

2. On the Organization Information tab, fill in the necessary fields.
 **Note:** The red asterisks indicate required fields. The Address, Users, Contact, Documents, and Award Status tabs appear only after you save the organization information. Make sure to save each tab information as you go.

My Applicant Profile : Yoda Property Manager

< Organization Information Address Users Contact >

Organization Name * EIN

Yoda Property Manager

Organization Type DUNS Number

Nonprofit

Website URL Main Phone

Fax Number

+13031231234

Save

Figure 60: My Applicant Profile – Organization Information Tab

3. **Optional:** On the Address tab, fill in the necessary fields.

My Applicant Profile : Yoda Property Manager

< Organization Information **Address** Users Contact Document >

Mailing Address

Address Line 1 Address Line 2 City

County State/Province/Region Country --Select Country--

Postal Code

Physical Address ☐ Same as Mailing Address

Address Line 1 Address Line 2 City

County State/Province/Region Country --Select Country--

Postal Code

Save

Figure 61: My Applicant Profile – Address Tab

4. **Optional:** Add a user. The user you registered with is automatically a user. Other users become applicant delegates.
 - a. Click the Users tab.

My Applicant Profile : Yoda Property Manager

Organization Information Address **Users** Contact Documents Award Status

+ New

Full Name	Confidential Question Access	Organization Name	Job Title	Phone Number	Email
<input type="checkbox"/> Sun Shine	<input checked="" type="checkbox"/>	Yoda Property Manager	Grants Manager	+13031231234	sshine@applicant.com
<input type="checkbox"/> Donald Duck	<input checked="" type="checkbox"/>	Yoda Property Manager	Grants Coordinator	13037896789	dduck@applicant.com

Total: 2

Use the arrows to see more users.

Use the drop-down list to choose how many users you see in the grid at a time.

Save

Figure 62: My Applicant Profile – Users Tab

- b. Click **+ New**. The Create New User dialog box appears.

My Applicant Profile : Yoda Property Manager

Organization Information Address **Users** Contact Documents Award Status

+ New **Add user**

<input type="checkbox"/>	Full Name	Confidential Question Access	Organization Name	Job Title	Phone Number	Email
<input type="checkbox"/>	Sun Shine	<input checked="" type="checkbox"/>	Yoda Property Manager	Grants Manager	+13031231234	sshine@applicant.com
<input type="checkbox"/>	Donald Duck	<input checked="" type="checkbox"/>	Yoda Property Manager	Grants Coordinator	13037896789	dduck@applicant.com

Total: 2

Save

Figure 63: Add User

- c. On the User information tab, fill in the necessary fields.
- Note:** The red asterisks indicate required fields.

Create New User

User Information Address

First Name *

Last Name *

Job Title

Email Address *

Phone Number

User Name *

This field is required.


Password *

Password (repeat) *

Passwords do not match!

Cancel Save

Figure 64: Create New User – User Information Tab

- d. **Optional:** On the Address tab, fill in the necessary fields.
- e. Click  **Save** to save the user. A green User Privilege popup appears at the top right of the screen. Repeat steps 4b-4d for each user.

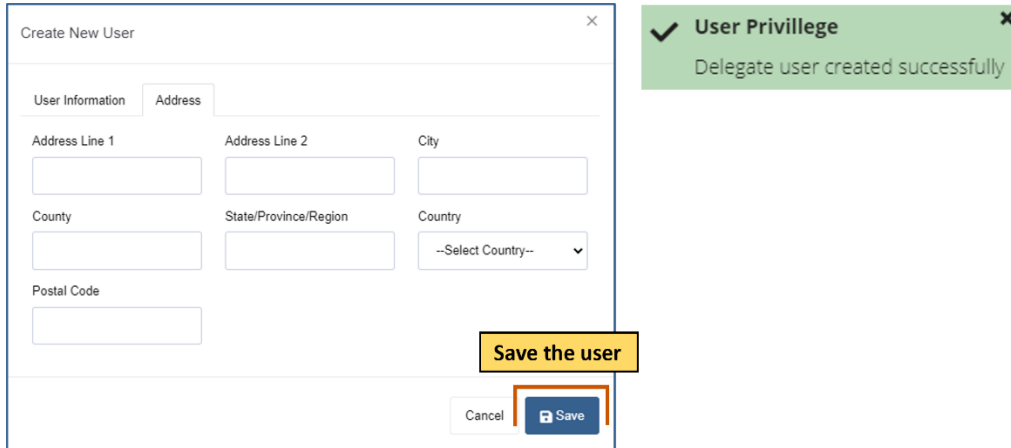


Figure 65: Create New User – Address Tab

Tip: If you are the primary applicant, you can choose to give access to confidential questions. If you are an Applicant Delegate – Confidential user or Applicant Delegate – Standard user, you cannot do this action. Marking users as confidential is not necessary to complete this step.

- f. Click the radio button next to the user you wish to give confidential question access. Uncheck the radio button to revoke confidential question access.

Organization Information Address Users Contact Documents Award Status						
+ New						
<input type="checkbox"/>	Full Name	Confidential Question Access	Organization Name	Job Title	Phone Number	Email
<input type="checkbox"/>	Sun Shine	<input checked="" type="checkbox"/>	Party Manager	Grants Manager	+13031231234	sshine@applicant.com
<input type="checkbox"/>	Donald Duck	<input checked="" type="checkbox"/>	Party Manager	Grants Coordinator	13037896789	dduck@applicant.com
<input type="checkbox"/>	Mickey Mouse	<input type="checkbox"/>	Party Manager			mmouse@applicant.com
Total: 3						

Figure 66: User Applicant Delegate – Confidential

Organization Information Address Users Contact Documents Award Status						
+ New						
<input type="checkbox"/>	Full Name	Confidential Question Access	Organization Name	Job Title	Phone Number	Email
<input type="checkbox"/>	Sun Shine	<input checked="" type="checkbox"/>	Property Manager	Grants Manager	+13031231234	sshine@applicant.com
<input type="checkbox"/>	Donald Duck	<input checked="" type="checkbox"/>	Property Manager	Grants Coordinator	13037896789	dduck@applicant.com
<input type="checkbox"/>	Mickey Mouse	<input type="checkbox"/>	Property Manager			mmouse@applicant.com
Total: 3						

Figure 67: User Applicant Delegate – Standard

5. **Optional:** On the Contact tab, add a contact. The user you registered with is automatically a contact.

My Applicant Profile : Yoda Property Manager						
Organization Information Address Users Contact Documents Award Status						
+ New						
<input type="checkbox"/>	Full Name	Confidential Question Access	Organization Name	Job Title	Phone Number	Email
<input type="checkbox"/>	Sun Shine	<input checked="" type="checkbox"/>	Yoda Property Manager	Grants Manager	+13031231234	sshine@applicant.com
Total: 1						

Figure 68: Create New User – Contact Tab

- a. Click **+ New**. The Create New Contact dialog box appears.

My Applicant Profile : Yoda Property Manager						
Organization Information Address Users Contact Documents Award Status						
+ New						
<input type="checkbox"/>	Full Name	Confidential Question Access	Organization Name	Job Title	Phone Number	Email
<input type="checkbox"/>	Sun Shine	<input checked="" type="checkbox"/>	Yoda Property Manager	Grants Manager	+13031231234	sshine@applicant.com
Total: 1						

Figure 69: Add Contact

- b. On the Contact Details, fill in the necessary fields.
- Note:** The red asterisks indicate required fields.

The screenshot shows a 'Create new contact' form with a close button (X) in the top right corner. There are two tabs: 'Contact Details' (active) and 'Address'. The 'Contact Details' tab contains six input fields arranged in two columns. The left column has 'First Name *', 'Job Title *', and 'Phone Number *'. The right column has 'Last Name *', 'Email *', and 'Fax Number'. Each field has a red asterisk indicating it is required. At the bottom right, there are two buttons: 'Cancel' and 'Save' (with a floppy disk icon).

Figure 70: Create New Contact – Contact Details Tab

- c. **Optional:** On the Address Details, fill in the necessary fields.
- d. Click **Save** to save the contact to the grid. A blue Saved Successfully popup appears at the bottom right of the screen. Repeat steps 8a-8d for each contact.

The screenshot shows the 'Create new contact' form with the 'Address' tab selected. The 'Contact Details' tab is also visible. The 'Address' tab contains six input fields: 'Address Line 1', 'Address Line 2', 'City', 'County', 'State/Province/Region', and 'Country'. The 'Country' field is a dropdown menu. At the bottom right, there are two buttons: 'Cancel' and 'Save' (with a floppy disk icon). A yellow callout box with an arrow points to the 'Save' button, containing the text 'Save the contact to the grid.' Below the form, a blue notification box with a white 'i' icon and the text 'Saved Successfully.' is visible.

Figure 71: Create New Contact – Address Tab

6. **Optional:** On the Document tab, add a document.

Tip: If you are a primary applicant or an Applicant Delegate – Confidential user, you can choose to mark documents as confidential. If you are an Applicant Delegate – Standard user, you do not have the option to mark documents as confidential. Confidential documents are marked with a lock. Confidential documents do not show up in the grid for Applicant Delegate – Standard users. Marking documents as confidential is not necessary to complete this step.

- a. **Optional:** Click the Confidential Document radio button to mark the document as confidential.

My Applicant Profile : Yoda Property Manager

Organization Information Address Users Contact Documents Award Status

Choose File ☒ Confidential Document Save Cancel

Actions	Document Name	Document Type	Date Uploaded
<input type="checkbox"/>	Review Report (2).pdf	PDF File	11-21-2021

Total: 1

Save

Figure 72: Mark Document as Confidential

- b. Click **Choose File**.
- c. Upload the file. The name of the file replaces the Choose File button.

My Applicant Profile : Yoda Property Manager

Organization Information Address Users Contact Documents Award Status

Choose File ☒ Confidential Document Save Cancel

Actions	Document Name	Document Type	Date Uploaded
<input type="checkbox"/>	Review Report (2).pdf	PDF File	11-21-2021

Total: 1

Save



My Applicant Profile : Yoda Property Manager

Organization Information Address Users Contact Documents Award Status


Application for - Better Education for Neighborhood Kids.docx ☒ Confidential Document Save Cancel

Actions	Document Name	Document Type	Date Uploaded
<input type="checkbox"/>	Review Report (2).pdf	PDF File	11-21-2021

Total: 1




Save

Figure 73: Add Attachment to Profile

- d. Click  **Save** to save the document to the grid. A blue Saved Successfully popup appears at the bottom right of the screen. Repeat steps 6a-6c for document.





My Applicant Profile : Yoda Property Manager


Organization Information Address Users Contact **Documents** Award Status

 Application for - Better Education for Neighborhood Kids.docx ☒ Confidential Document  **Save**  Cancel

Actions	Document Name	Document Type	Date Uploaded
<input type="checkbox"/>	Review Report (2).pdf	PDF File	11-21-2021

Total: 1

  **1**   10 ▾

 **Save**






 **Saved Successfully.**

Figure 74: Save Attachment to Profile

My Applicant Profile : Yoda Property Manager





Organization Information Address Users Contact **Documents** Award Status

 Choose File ☒ Confidential Document  **Save**  Cancel

Actions	Document Name	Document Type	Date Uploaded
<input type="checkbox"/> 	Application for - Better Education for Neighborhood Kids.docx	Word Document	11-22-2021
<input type="checkbox"/>	Review Report (2).pdf	PDF File	11-21-2021

Total: 2

Confidential documents are marked with a lock.

  **1**   10 ▾


 **Save**

Figure 75: Confidential Document

7. **Optional:** Check the status of an award.

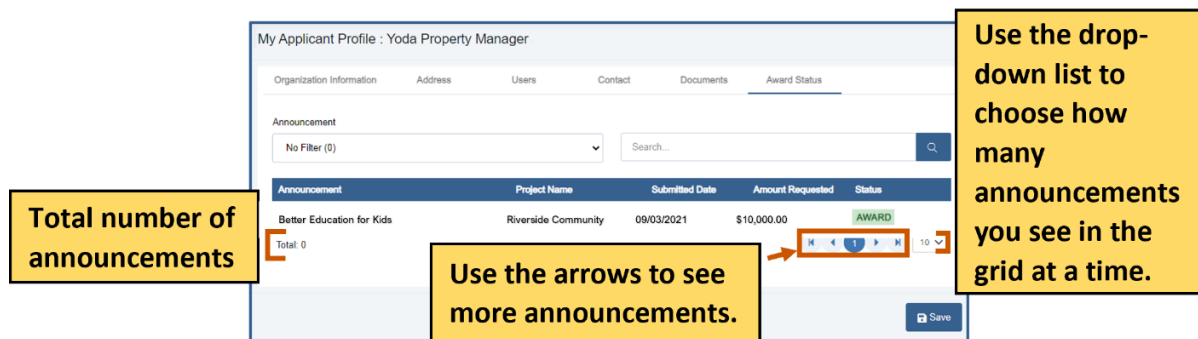


Figure 76: Create New Contact – Award Status Tab

- Click the Award Status tab.
 - Use the Announcement drop-down list to choose an announcement.
- Or
- Use the search bar to find an announcement.

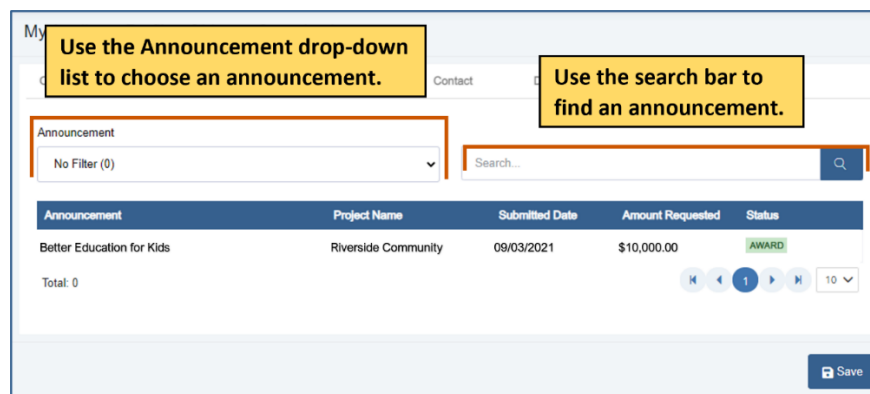



Figure 77: Choose Announcement

- Click  **Save** to save the applicant profile and close the dialog box. A blue Saved Successfully popup appears at the bottom right of the screen.

My Applicant Profile : Yoda Property Manager

Organization Information Address Users Contact Documents Award Status

Announcement

No Filter (0) Search...

Announcement	Project Name	Submitted Date	Amount Requested	Status
Better Education for Kids	Riverside Community	09/03/2021	\$10,000.00	AWARD

Total: 0

Save the applicant profile.

Save

Saved Successfully.

Figure 78: Save Applicant Profile

Users

View the users related to the application. You can view active or inactive users.

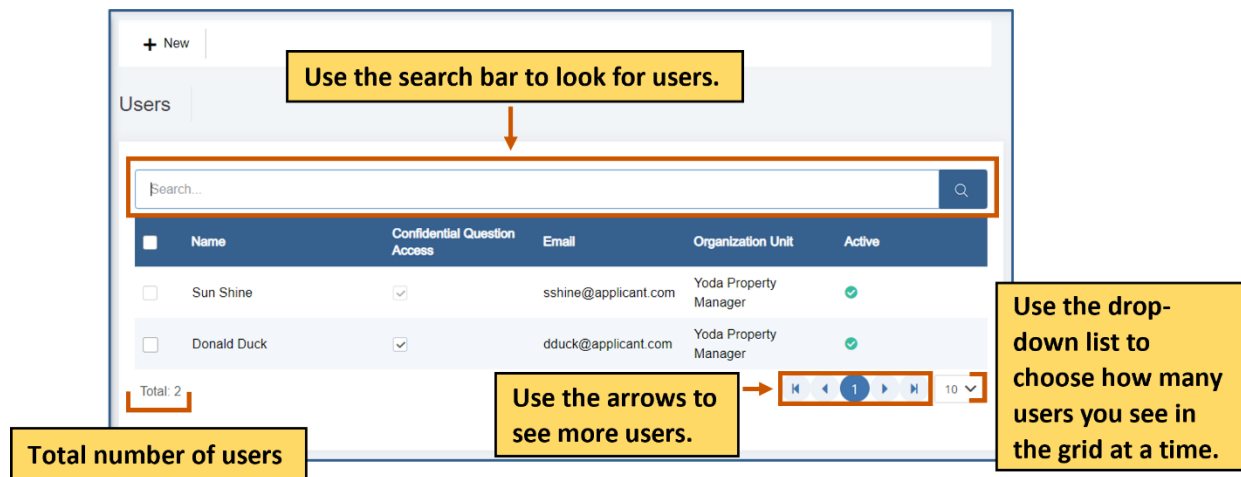


Figure 79: Active Users Screen

Active

You can view active users.

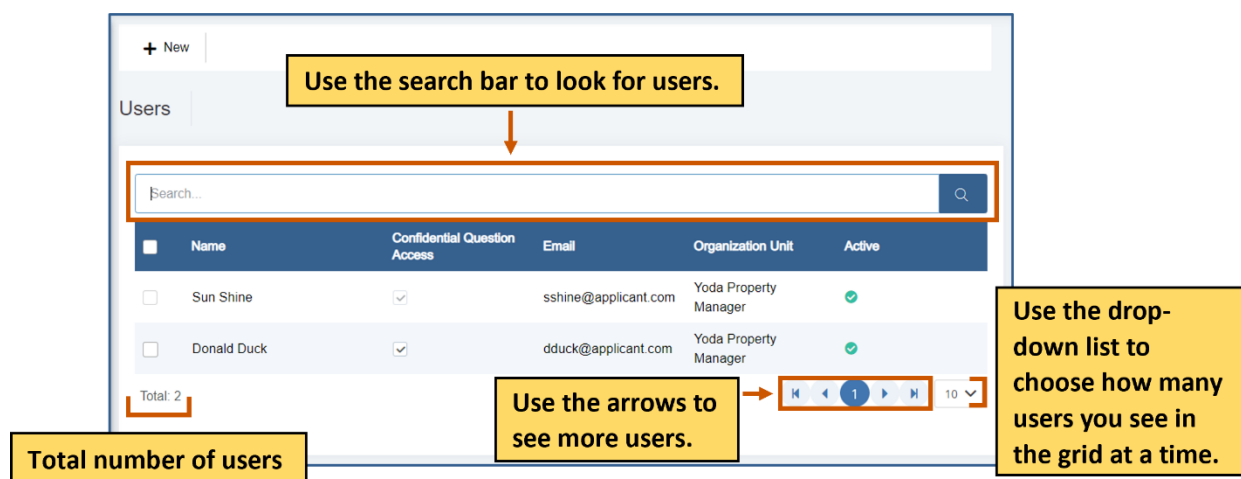




Figure 80: Active Users Screen

1. From the site map, click  **Users** and choose  **Active** from the drop-down list. The Active Users screen appears.

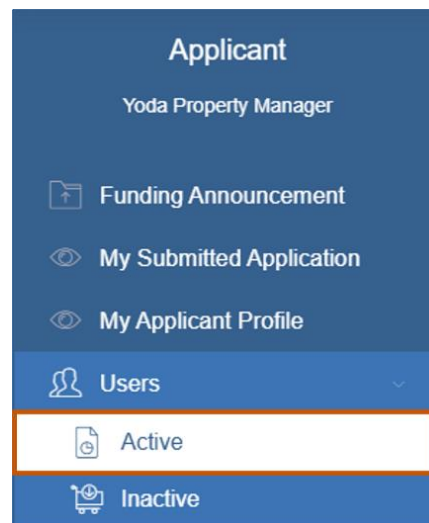


Figure 81: Site Map – Active Users

Inactive

You can view inactive review panels.

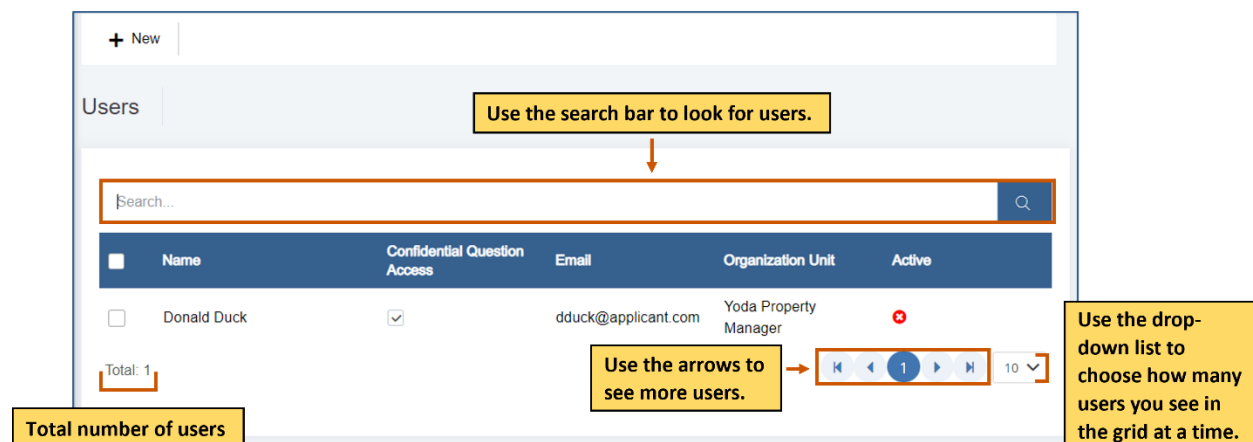




Figure 82: Inactive Users Screen

1. From the site map, click  **Users** and choose  **Inactive** from the drop-down list. The Inactive Users screen appears.

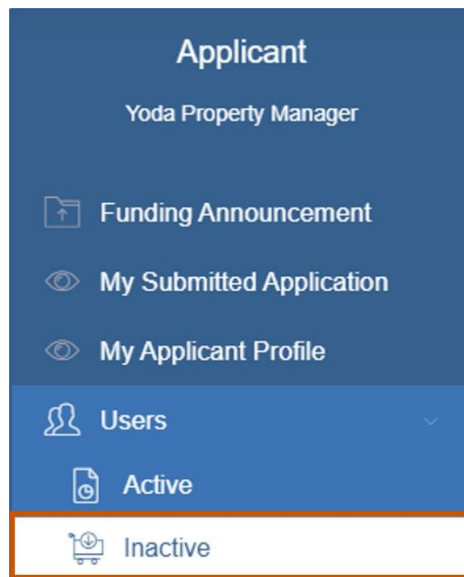




Figure 83: Site Map – Inactive Users

Create a User

You complete this action from both the Active Users and Inactive Users options from the sitemap. You can mark an applicant as confidential only if you are a primary applicant.

1. From the site map, click  **Users** and choose  **Active** from the drop-down list. The Active Users screen appears.

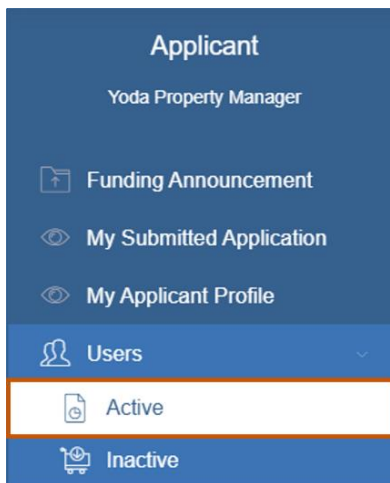


Figure 84: Site Map – Active Users

2. Click **+ New**. The Create New User dialog box appears.

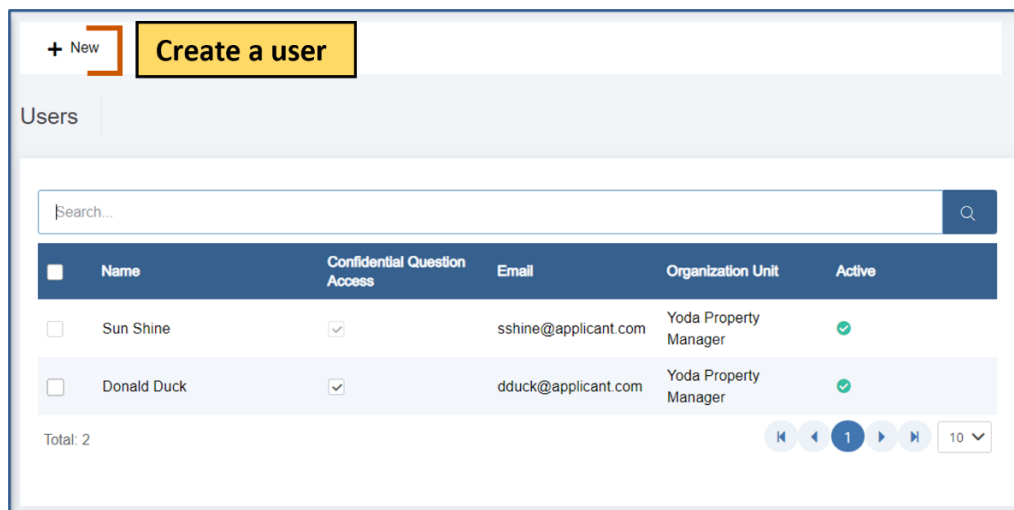




Figure 85: Create User

Under the Active column:

-  indicates the user is inactive.
-  indicates the user is active.

3. On the User information tab, fill in the necessary fields.

Note: The red asterisks indicate required fields.

The default is the organization you are viewing. You cannot switch with a different organization.

Create New User

User Information Address

First Name *

Last Name *

Parent Organization *

Yoda Property Manager

Job Title

Email Address *

Phone Number

User Name *

This field is required.

Password *

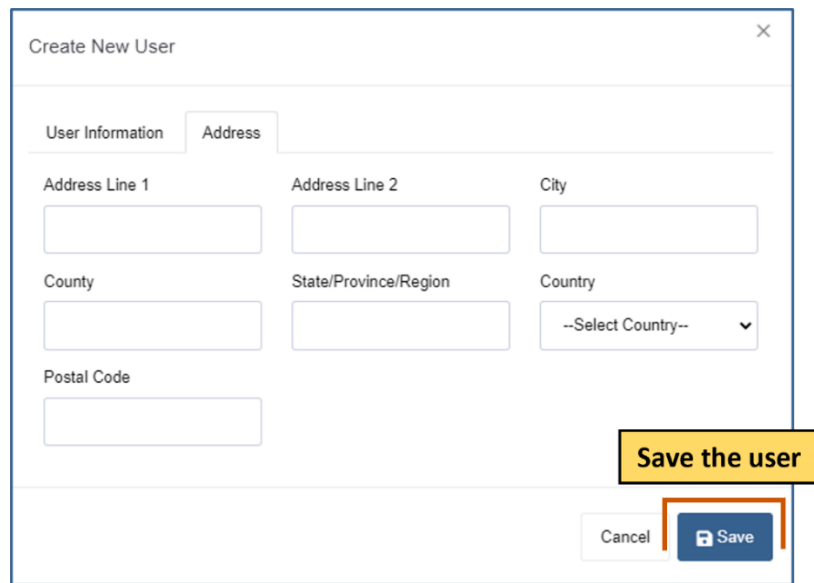
Password (repeat) *

• Passwords do not match!

Cancel Save

Figure 86: User Screen – User Information Tab

4. On the Address tab, fill in the necessary fields.
- Note:** The red asterisks indicate required fields.
5. Click **Save** to save the user. They appear in the grid. A blue Saved Successfully popup appears at the bottom right of the screen. Repeat steps 2-5 for each user.



The 'Create New User' form has two tabs: 'User Information' and 'Address'. The 'Address' tab is active, showing fields for Address Line 1, Address Line 2, City, County, State/Province/Region, Country (a dropdown menu with '--Select Country--'), and Postal Code. A yellow callout box labeled 'Save the user' points to the 'Save' button at the bottom right of the form. The 'Save' button is highlighted with an orange border.



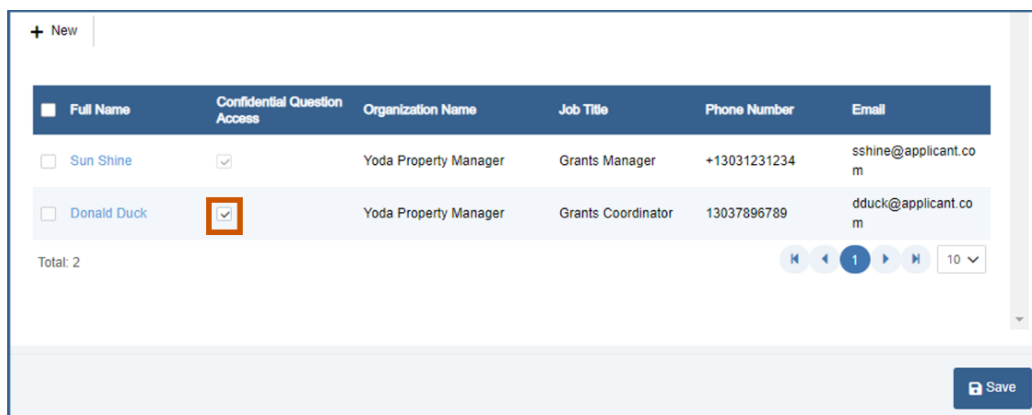
 Saved Successfully.

Figure 87: Create New User – Address Tab

6. **Optional:** Check the radio button under the Confidential Question Access column to give the user access to confidential questions. A green Update Successfully appears. Marking a user confidential is not necessary for completing this task. Uncheck the radio button under the Confidential Question Access column to deny the user access to confidential questions.

 **Note:** If you are the primary applicant, you can choose to give access to confidential questions. If you are an Applicant Delegate – Confidential user or Applicant Delegate – Standard user, you cannot do this action.



The table shows a list of users with columns: Full Name, Confidential Question Access, Organization Name, Job Title, Phone Number, and Email. The 'Confidential Question Access' column has a checkbox for each user. The checkbox for 'Donald Duck' is checked and highlighted with an orange border. A 'Save' button is at the bottom right.

Full Name	Confidential Question Access	Organization Name	Job Title	Phone Number	Email
<input type="checkbox"/> Sun Shine	<input checked="" type="checkbox"/>	Yoda Property Manager	Grants Manager	+13031231234	sshine@applicant.com
<input type="checkbox"/> Donald Duck	<input checked="" type="checkbox"/>	Yoda Property Manager	Grants Coordinator	13037896789	dduck@applicant.com

 Update Successfully

Figure 88: Give Confidential Access

+ New

Users

Search...

	Name	Confidential Question Access	Email	Organization Unit	Active
<input type="checkbox"/>	Sun Shine	<input checked="" type="checkbox"/>	sshine@applicant.com	Yoda Property Manager	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Donald Duck	<input type="checkbox"/>	dduck@applicant.com	Yoda Property Manager	<input checked="" type="checkbox"/>

Total: 2

1

10

Update Successfully

Figure 89: Deny Confidential Access

Edit a User

1. **Optional:** Use the search bar to find a user.
2. **Double-click** the user to edit it. The Edit User dialog box appears.

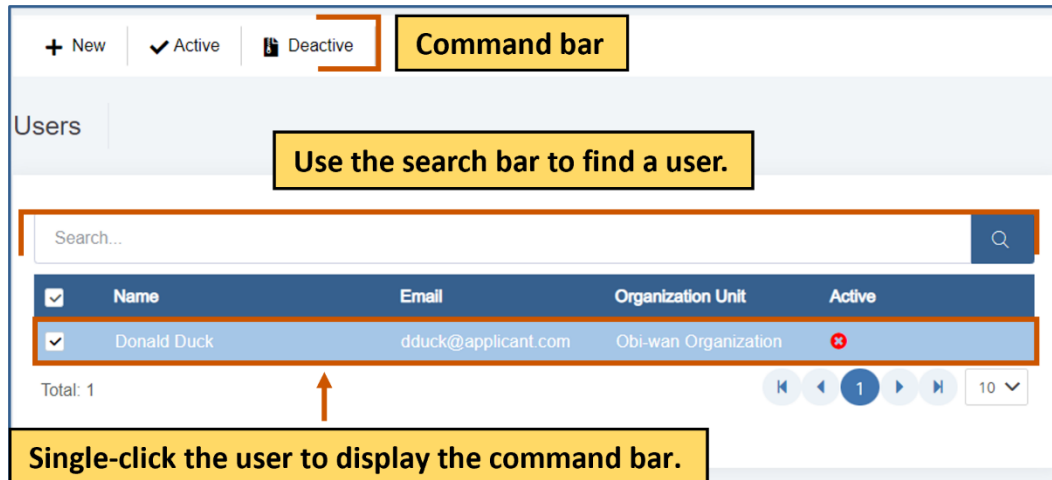


Figure 90: Display User Commands

3. Edit the necessary fields for each tab.
4. Click **Save**. The changes are saved. A blue Saved Successfully popup appears at the bottom right of the screen. Repeat steps 1-5 for each council review you wish to edit.

The screenshot shows the 'Create New User' dialog box with the 'Address' tab selected. The 'User Information' tab is also visible. The 'Address' tab contains fields for 'Address Line 1', 'Address Line 2', 'City', 'County', 'State/Province/Region', and 'Country'. The 'Country' field is a dropdown menu with the text '--Select Country--'. The 'Postal Code' field is also present. At the bottom right, there are 'Cancel' and 'Save' buttons. An orange box with the text 'Save the user' points to the 'Save' button. Below the dialog box, a blue popup message says 'Saved Successfully.'

Figure 91: Create New User – Address Tab

Activate a User

You complete this action from both the Active Users and Inactive Users options from the sitemap.

1. **Optional:** Use the search bar to find a user.
2. **Single-click** the user to display the command bar.

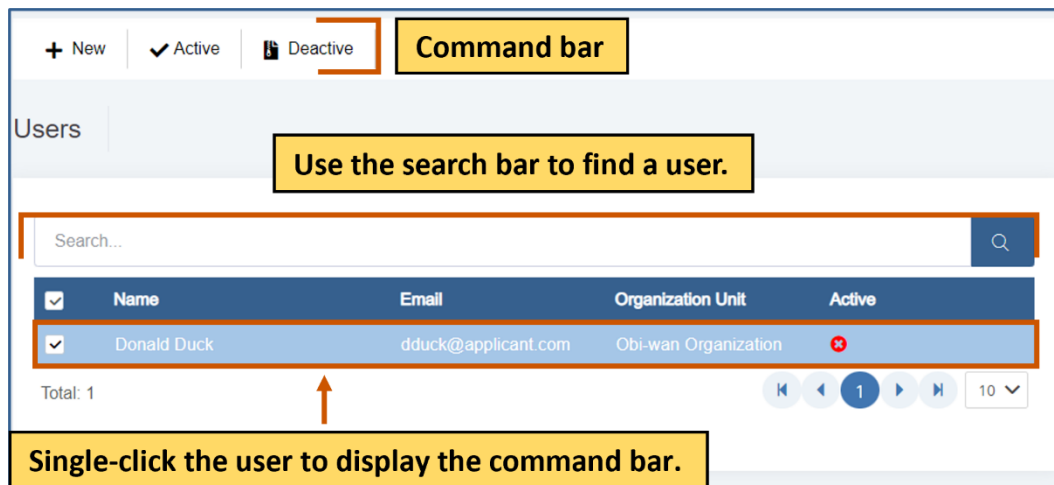


Figure 92: Display User Commands

3. Click **✓ Activate**. A message popup asks if you are sure you want to activate the user.

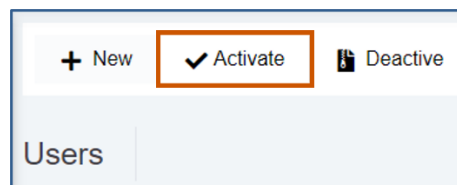


Figure 93: Activate User

4. Click **Yes**. The user is deactivated. A green Activated Successfully popup appears at the bottom right of the screen. Repeat steps 1-4 for each user you wish to deactivate.

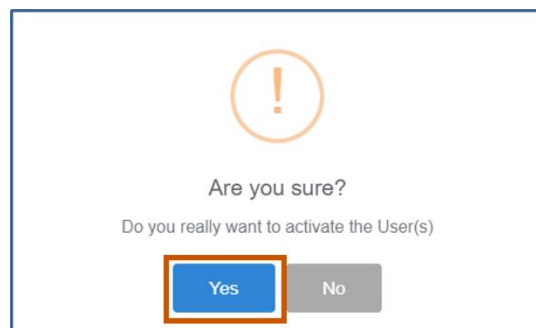


Figure 94: Warning to Activate User

Deactivate a User

You complete this action from both the Active Users and Inactive Users options from the sitemap.

1. **Optional:** Use the search bar to find a user.
2. **Single-Click** the user to display the command bar.

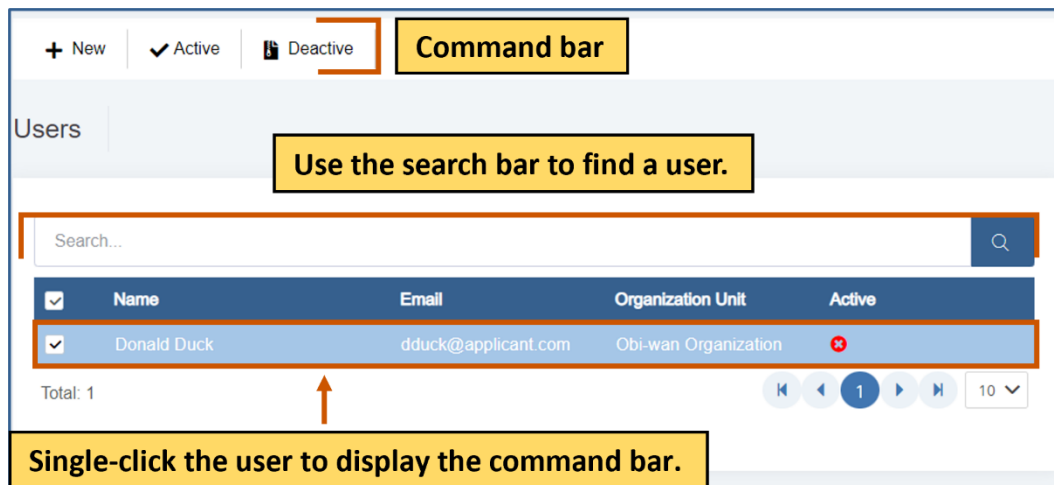


Figure 95: Display User Commands

3. Click **Deactivate**. A message popup asks if you are sure you want to deactivate the user.

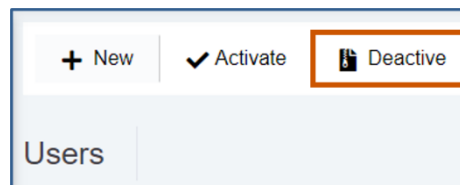


Figure 96: Deactivate User

4. Click **Yes**. The reviewer is deactivated. A green Activated Successfully popup appears at the bottom right of the screen. Repeat steps 1-4 for each reviewer you wish to deactivate.

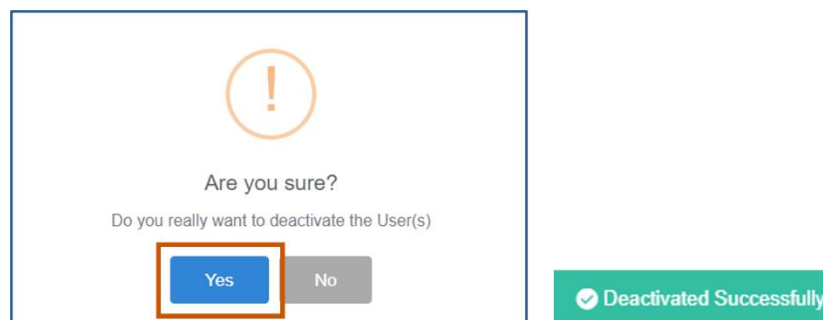


Figure 97: Warning to Activate User

Contacts

View the contacts related to the application.

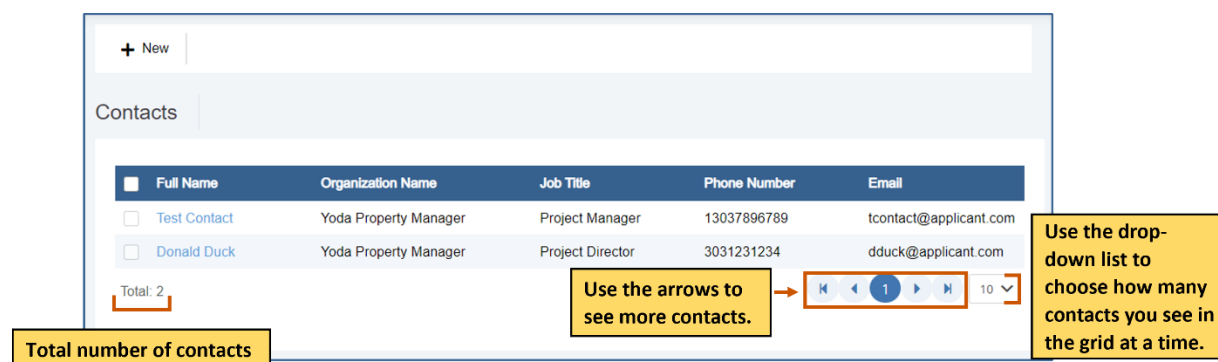


Figure 98: Contacts Screen

Add a Contact

1. From the site map, click  **Contacts**. The Contacts for Applicant page appears.

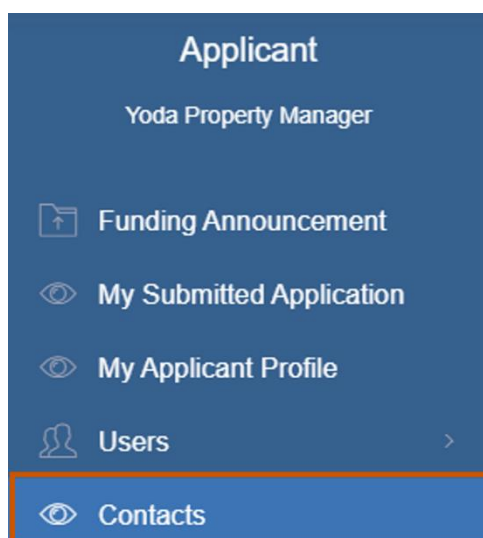


Figure 99: Site Map - Contacts

2. Click **+ New**. The Create New Contact dialog box appears.

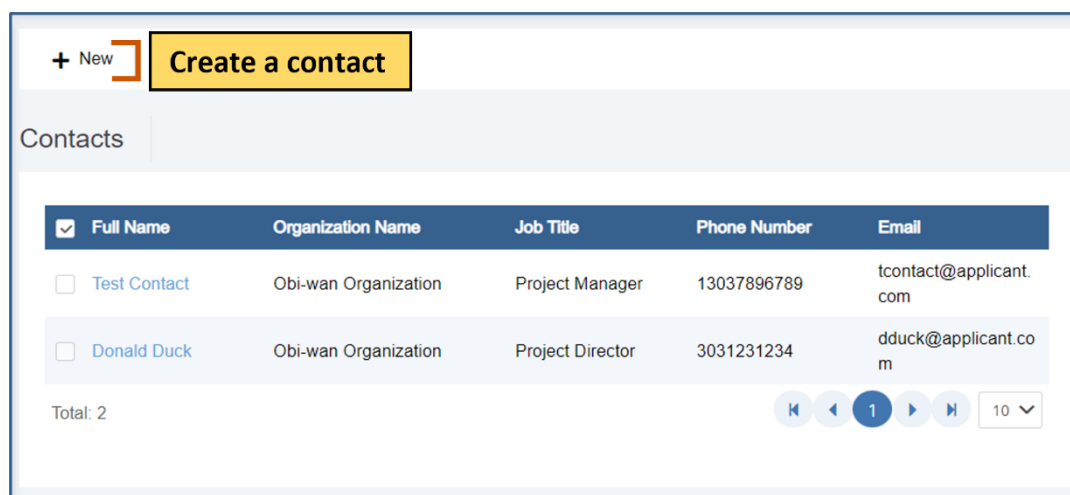


Figure 100: New Contact

- On the Contact Details tab, fill in the necessary fields.

Note: The red asterisks indicate required fields.

Create new contact

Contact Details Address

First Name * Last Name *

Job Title * Email *

Phone Number * Fax Number

Cancel Save

Figure 101: Create New Contact – Contact Details Tab

- Optional:** On the address tab, edit the the necessary fields.
- Note:** The red asterisks indicate required fields.
- Click **Save** to save the contact. They appear in the grid. A blue Saved Successfully popup appears at the bottom right of the screen. Repeat steps 2-4 for each contact.

Create new contact

Contact Details Address

Address Line 1 Address Line 2 City

County State/Province/Region Country

Postal Code

Cancel Save

Save the contact to the grid.

Saved Successfully.

Figure 102: Create New Contact – Address Tab

Edit a Contact

1. **Double-click** the user to edit it. The Edit User dialog box appears.

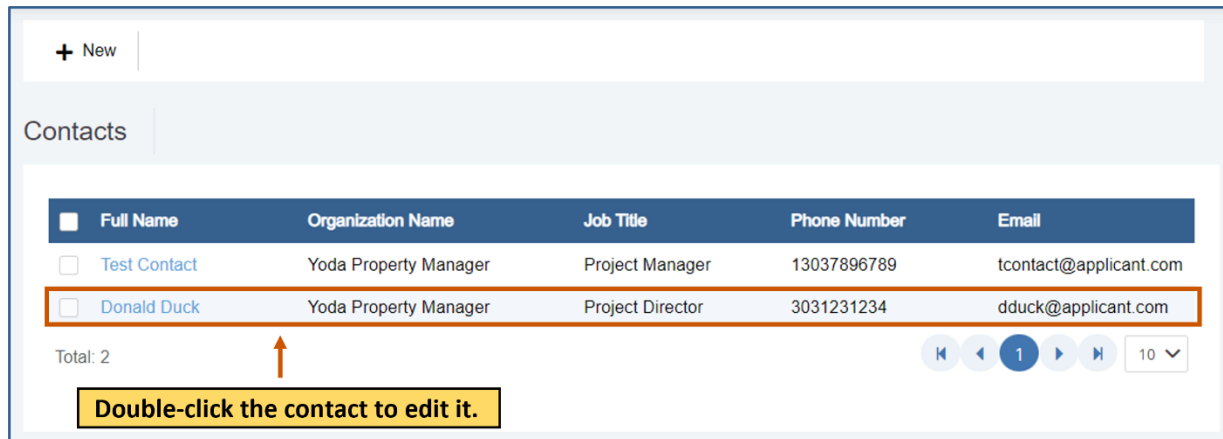


Figure 103: Edit Contact


2. Edit the necessary fields for each tab.
3. Click  **Save**. The changes are saved. A blue Saved Successfully popup appears at the bottom right of the screen. Repeat steps 1-5 for each council review you wish to edit.

Figure 104: Create New Contact – Address Tab

Delete a Contact

1. Click the radio button next to the name of contact to display the command bar.

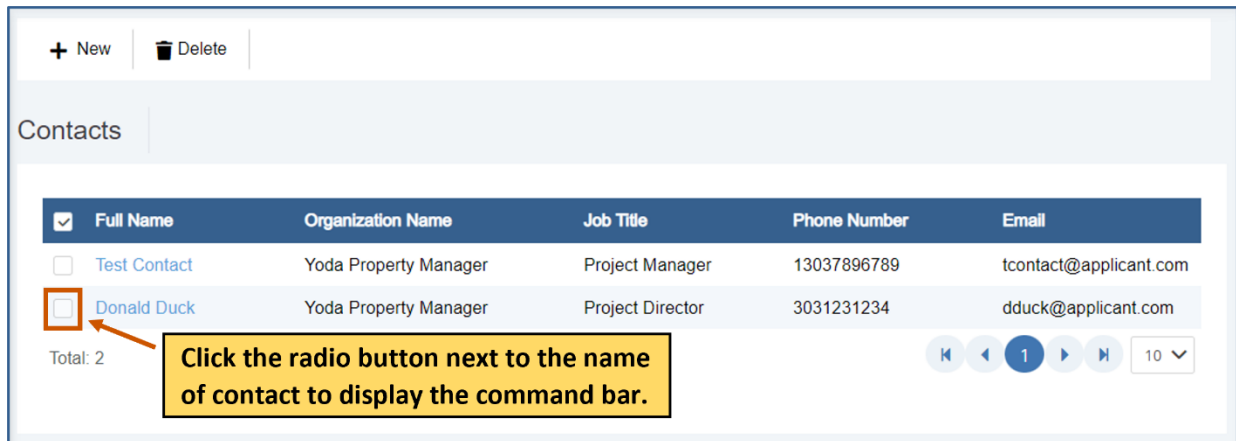


Figure 105: Click Contact

2. Click **Delete** . A message popup asks if you are sure you want to delete the contact.

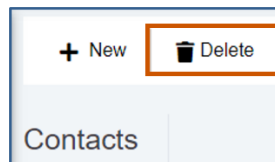


Figure 106: Delete Contact

3. Click **Yes**. The contact is deleted. A green Deleted Successfully popup appears at the bottom right of the screen. Repeat steps 1-4 for each contact you wish to delete.

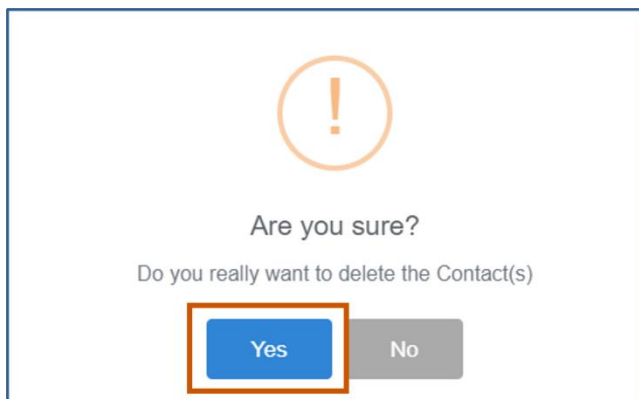


Figure 107: Warning to Delete Contact

Documents

View documents related to the application.

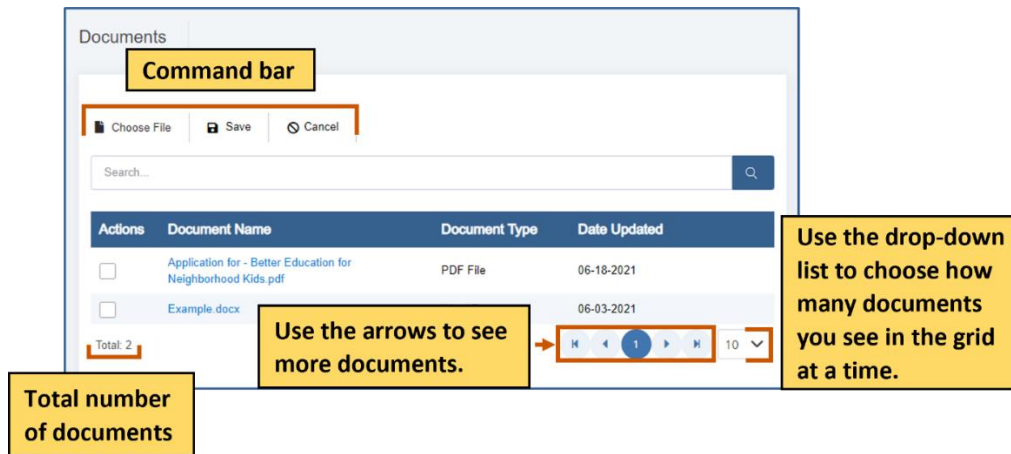


Figure 108: Documents Screen

Primary Applicant and Applicant Delegate – Confidential vs. Applicant Delegate – Standard Users

Primary applicants and Applicant Delegate – Confidential users can choose to mark documents as confidential. Applicant Delegate – Standard users do not have the option to mark documents as confidential. Confidential documents are not visible for Applicant Delegate – Standard users.

Primary Applicant and Applicant Delegate – Confidential User Commands





Command Options	Description
Choose File 	Choose the file you want to upload.
Confidential Document 	<p>Mark a document as confidential. Only primary applicants and Applicant Delegate – Confidential users can use this feature.</p> <p>Confidential documents are marked with a lock and are not seen by Applicant Delegate – Standard users.</p>
Save 	Save the file you want to upload.
Cancel 	If you choose a file you do not want to upload, you can cancel uploading the file.

Table 3: Document Command Options

Applicant Delegate – Standard User Commands





Command Options	Description
Choose File 	Choose the file you want to upload.
Save 	Save the file you want to upload.
Cancel 	If you choose a file you do not want to upload, you can cancel uploading the file.

Table 4: Document Command Options

Add a Document

1. From the site map, click  **Documents**. The Attach Document for Applicant screen appears.

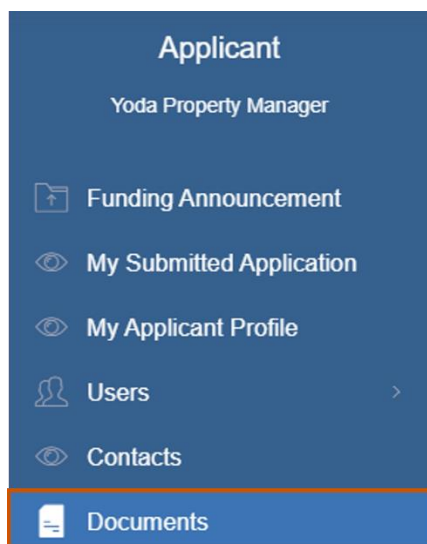


Figure 109: Site Map - Documents

2. **Optional:** Click the Confidential Document radio button to mark the document as confidential.

Tip: If you are a primary applicant or an Applicant Delegate – Confidential user, you can choose to mark documents as confidential. If you are an Applicant Delegate – Standard user, you do not have the option to mark documents as confidential. Confidential documents are marked with a lock. Confidential documents do not show up in the grid for Applicant Delegate – Standard users. Marking documents as confidential is not necessary to complete this step.

My Applicant Profile : Yoda Property Manager

Organization Information Address Users Contact Documents Award Status

☒ Confidential Document

Actions	Document Name	Document Type	Date Uploaded
<input type="checkbox"/>	Review Report (2).pdf	PDF File	11-21-2021

Total: 1

Figure 110: Mark Document as Confidential

3. Click **Choose File**.
4. Upload the file. The name of the file replaces the Choose File button.

My Applicant Profile : Yoda Property Manager

Organization Information Address Users Contact Documents Award Status

☒ Confidential Document

Actions	Document Name	Document Type	Date Uploaded
<input type="checkbox"/>	Review Report (2).pdf	PDF File	11-21-2021

Total: 1

↓

My Applicant Profile : Yoda Property Manager

Organization Information Address Users Contact Documents Award Status

☒ Confidential Document

Actions	Document Name	Document Type	Date Uploaded
<input type="checkbox"/>	Review Report (2).pdf	PDF File	11-21-2021

Total: 1

Figure 111: Add Attachment to Profile

5. Click **Save** to save the document to the grid. A blue Saved Successfully popup appears at the bottom right of the screen. Repeat steps 3-5 for each document.

My Applicant Profile : Yoda Property Manager

Organization Information Address Users Contact **Documents** Award Status

Application for - Better Education for Neighborhood Kids.docx ☒ Confidential Document Save Cancel

Actions	Document Name	Document Type	Date Uploaded
<input type="checkbox"/>	Review Report (2).pdf	PDF File	11-21-2021

Total: 1

Save

Saved Successfully.

Figure 112: Save Attachment to Profile

My Applicant Profile : Yoda Property Manager

Organization Information Address Users Contact **Documents** Award Status

Choose File ☒ Confidential Document Save Cancel

Actions	Document Name	Document Type	Date Uploaded
<input type="checkbox"/>	Application for - Better Education for Neighborhood Kids.docx	Word Document	11-22-2021
<input type="checkbox"/>	Review Report (2).pdf	PDF File	11-21-2021

Total: 2

Save

Confidential documents are marked with a lock.

Figure 113: Confidential Document

Delete a Document

1. Click the radio button next to the name of document to display the command bar.

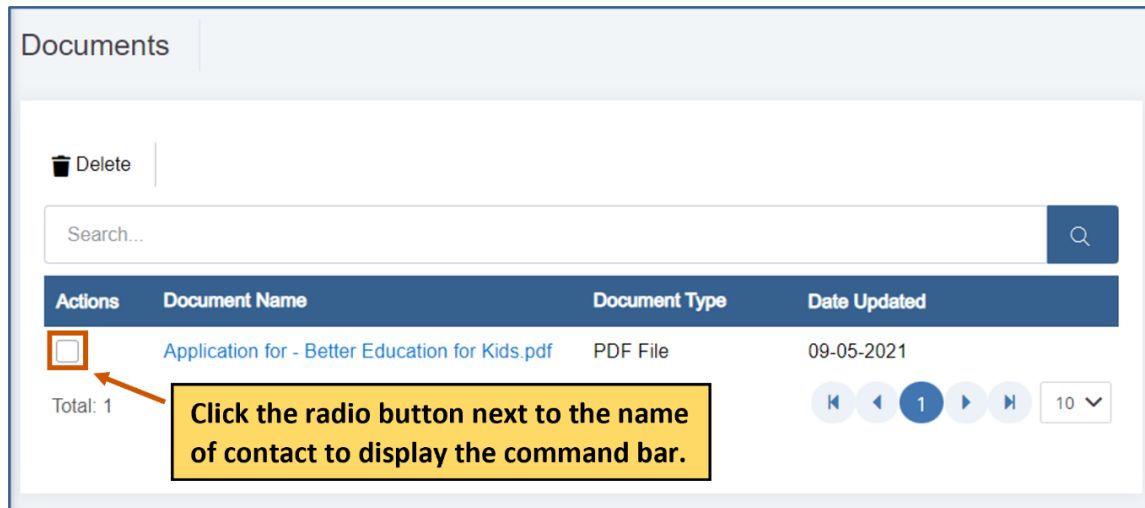


Figure 114: Click Document

2. Click **Delete**. A message popup asks if you are sure you want to delete the document.

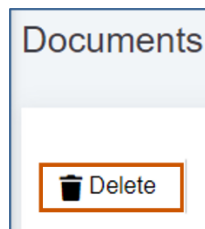


Figure 115: Delete Document

3. Click **Yes**. The document is deleted. A green Deleted Successfully popup appears at the bottom right of the screen. Repeat steps 1-4 for each document you wish to delete.

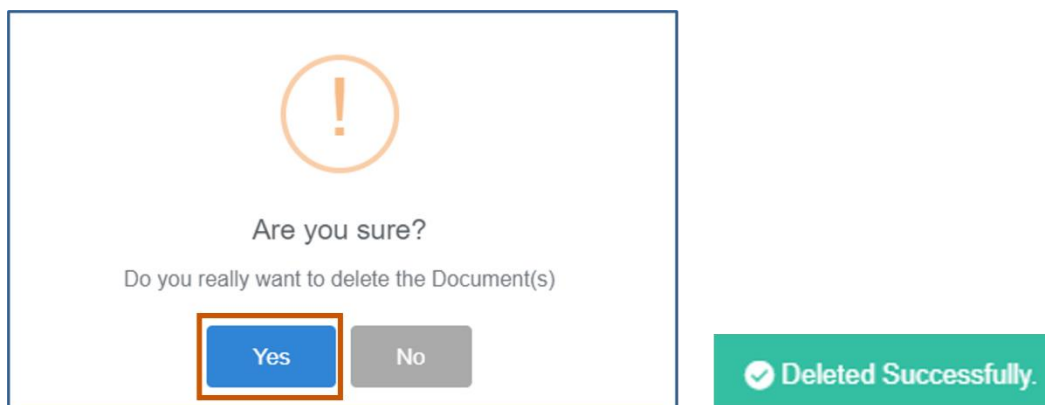


Figure 116: Warning to Delete Document

Applicant Question Types

Attachment – Budget Template

To complete this question, add an attachment of the Budget Template.

1. If necessary, click “Click here to download Budget Template”.
2. Fill in the Budget Template.

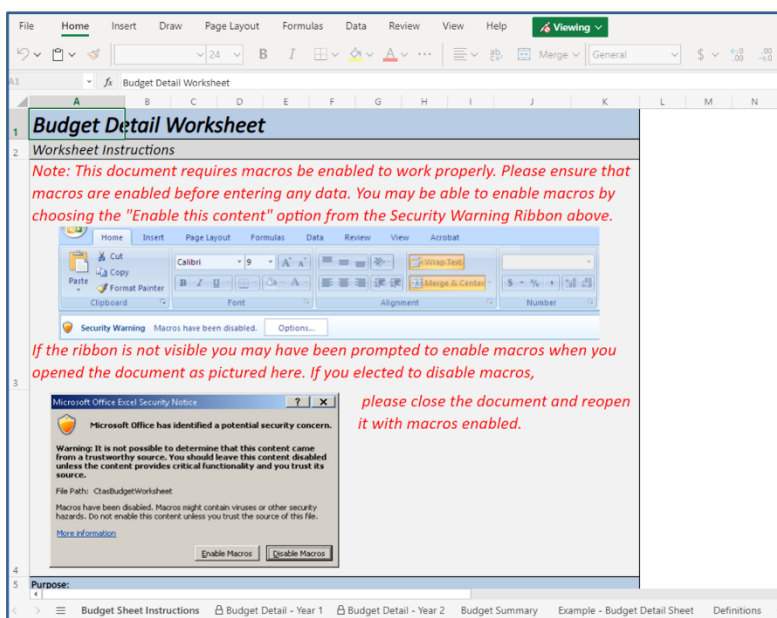
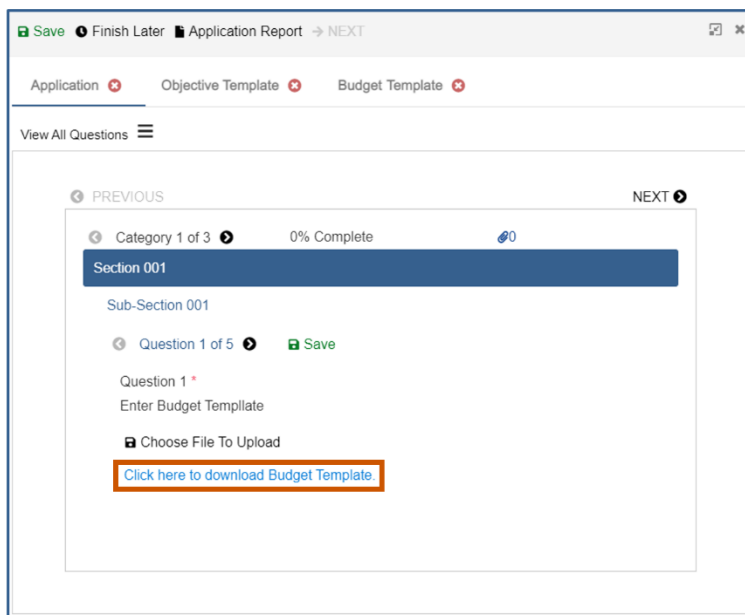



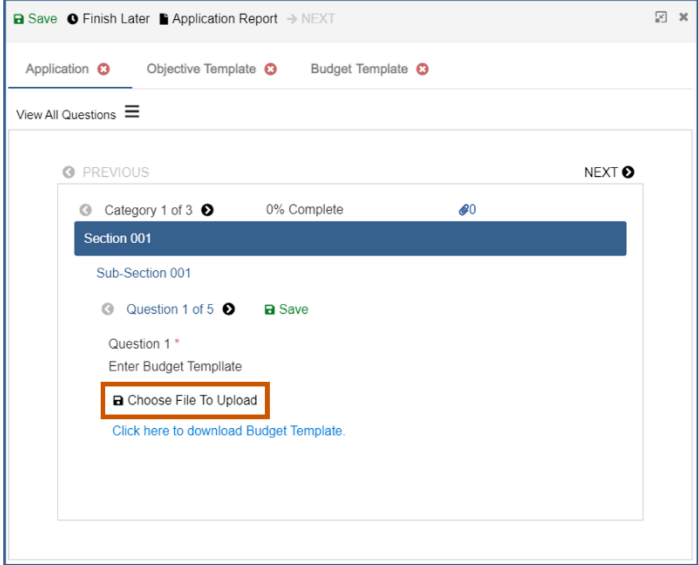


Figure 117: Download Budget Template

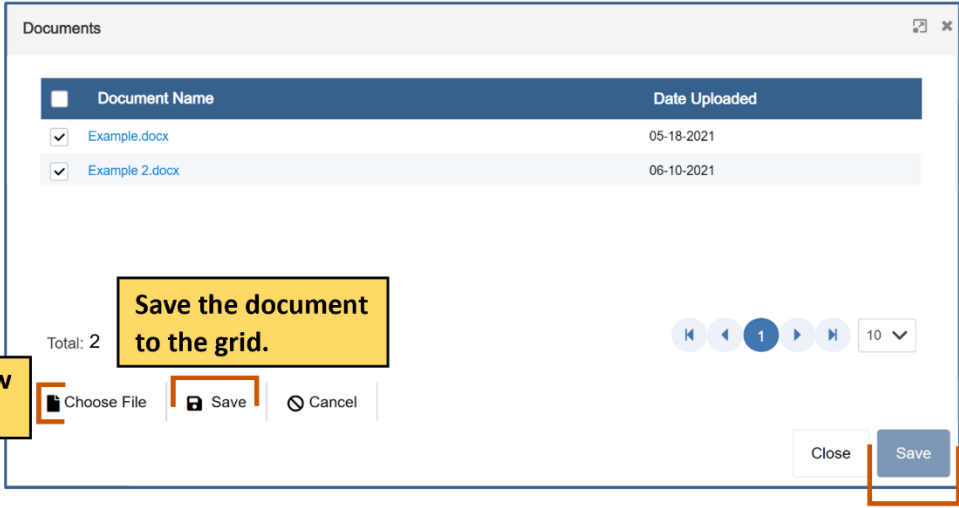
Applicant Question Types

3. Click  **Choose File to Upload.**
4. Choose from grid.
Or
Click  **Choose File.**
 - a. Upload the document.
 - b. Click  **Save.**
5. Click **Save.**



The screenshot shows the 'Application Report' window with the 'Budget Template' tab selected. Under 'Section 001', 'Question 1 of 5' is displayed with the prompt 'Enter Budget Template'. The 'Choose File To Upload' button is highlighted with an orange box. A blue link 'Click here to download Budget Template.' is also visible.

↓



The 'Documents' modal window displays a table of uploaded documents:

Document Name	Date Uploaded
<input checked="" type="checkbox"/> Example.docx	05-18-2021
<input checked="" type="checkbox"/> Example 2.docx	06-10-2021

At the bottom, the 'Total: 2' is shown. The 'Choose File' button is highlighted with an orange box. A yellow callout box says 'Save the document to the grid.' The 'Save' button is also highlighted with an orange box. A yellow callout box at the bottom right says 'Save the document(s) to the question'.

Upload a new document.

Save the document to the grid.




Save the document(s) to the question

Figure 118: Upload Budget Template

Announcement Question Types

Attachment – Other

To complete this question, add an attachment.

1. Click  **Choose File to Upload.**
2. Choose from grid.
Or
Click  **Choose File.**
 - a. Upload the document.
 - b. Click  **Save.**
3. Click **Save.**

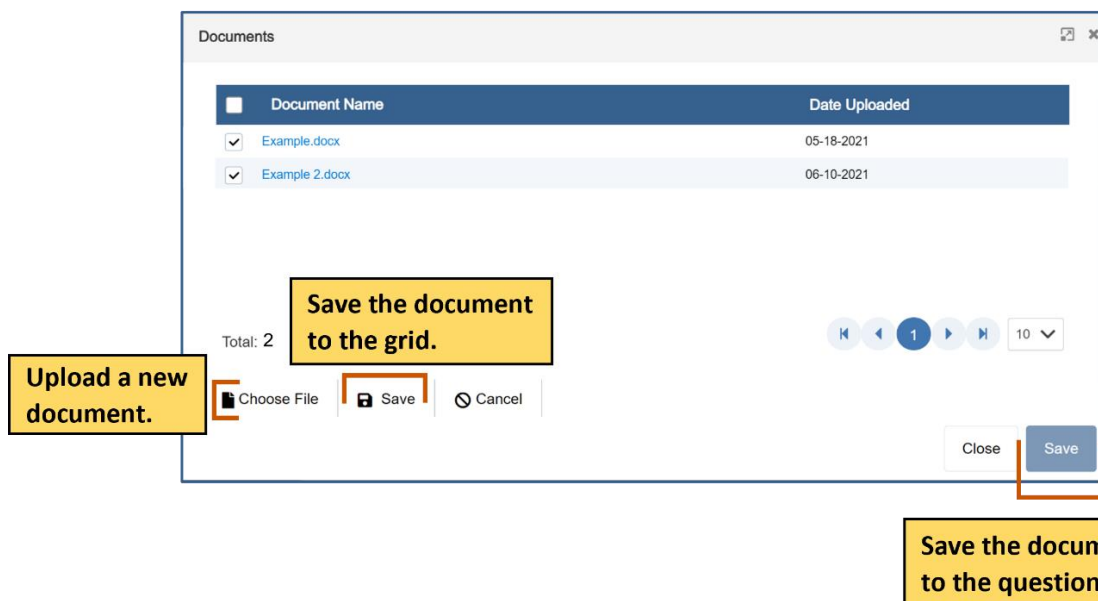
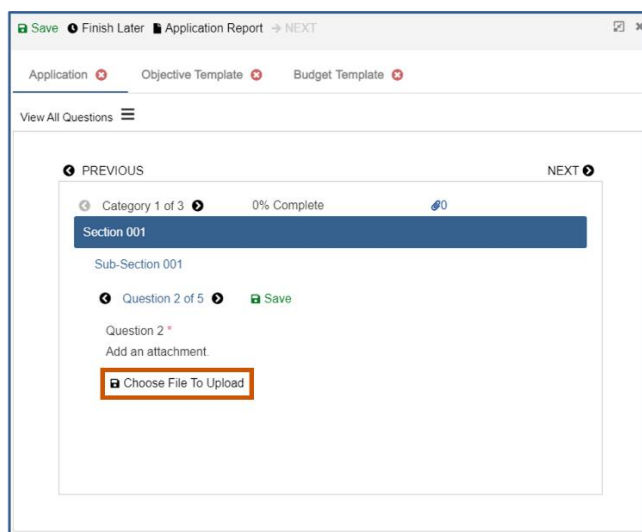


Figure 119: Add Attachment

Announcement Question Types

Checklist

To complete this question, choose from the checklist. You can choose the options that best answer the question. This is a multi-select dropdown and users must select the checkbox next to the option to select.

1. Use the drop-down list to choose from the checklist.

The figure consists of two screenshots of the GrantVantage application interface, connected by a downward-pointing orange arrow. The top screenshot shows a question titled 'Question 3' with the instruction 'Use the checklist to answer the question.' Below the instruction is a standard dropdown menu with the text 'Choose' and a downward arrow. The bottom screenshot shows the same question, but the dropdown menu has been expanded to reveal a checklist. The checklist has two options: 'Checklist Option 1' and 'Checklist Option 2'. 'Checklist Option 1' is selected, indicated by a blue background and a checkmark. 'Checklist Option 2' is not selected, indicated by a white background and an unchecked checkbox. The interface also shows navigation buttons like 'PREVIOUS', 'NEXT', and 'Save', and a progress indicator showing '8% Complete'.


Figure 120: Choose from Checklist

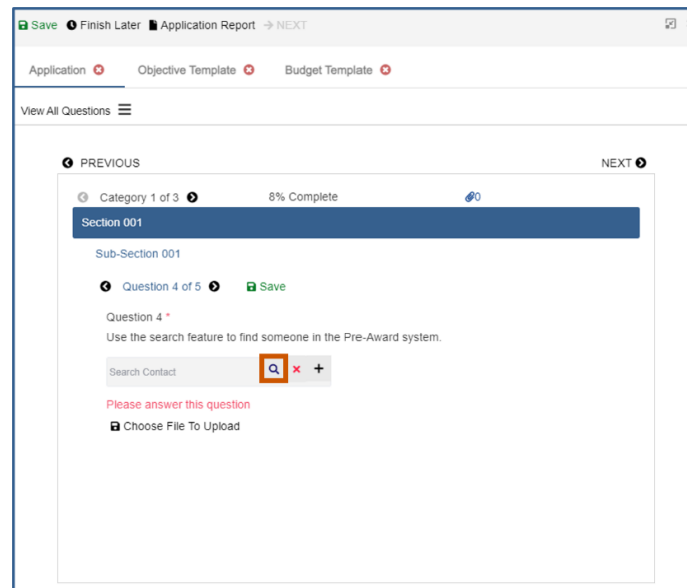
Announcement Question Types

Contact Lookup

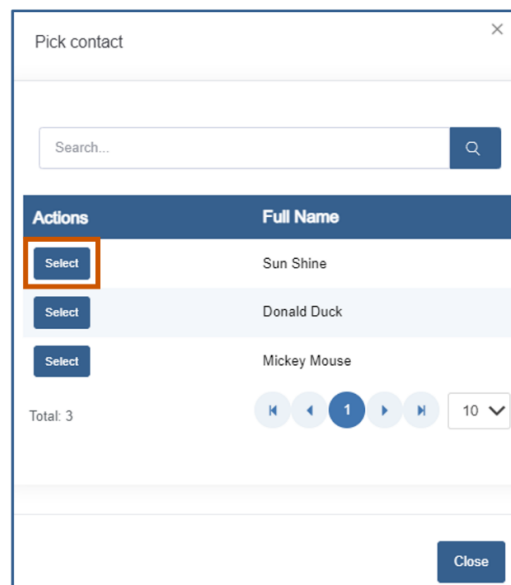
To complete this question, lookup a contact. Contacts are created in the Applicant Profile in the Contacts Section or can be created by selecting the **+** on the Contact Lookup field.

Add an Existing Contact

1. Click **Search** . The Pick Contact dialog box appears.
2. Click **Select** next to the contact's name. The contact's name appears in the Contact Lookup Field.



The screenshot shows a web application interface. At the top, there are tabs: 'Application' (active), 'Objective Template', and 'Budget Template'. Below the tabs is a 'View All Questions' link. The main content area shows a progress bar for 'Category 1 of 3' at '8% Complete'. Below this is 'Section 001' and 'Sub-Section 001'. The current question is 'Question 4 of 5', titled 'Question 4 *', with the instruction 'Use the search feature to find someone in the Pre-Award system.' Below the instruction is a 'Search Contact' field with a magnifying glass icon, a red 'x' icon, and a '+' icon. Below the search field is a red text prompt 'Please answer this question' and a 'Choose File To Upload' button.



The 'Pick contact' dialog box has a search bar at the top with a magnifying glass icon. Below the search bar is a table with two columns: 'Actions' and 'Full Name'. The table contains three rows of contacts: 'Sun Shine', 'Donald Duck', and 'Mickey Mouse'. Each row has a 'Select' button next to it. The 'Select' button for 'Sun Shine' is highlighted with a red box. At the bottom of the table, there is a 'Total: 3' label and a pagination control showing '1' of 3 pages. A 'Close' button is located at the bottom right of the dialog box.

Actions	Full Name
Select	Sun Shine
Select	Donald Duck
Select	Mickey Mouse

Figure 121: Search Contact

Announcement Question Types

The screenshot shows a web application interface for GrantVantage. At the top, there are tabs for 'Application', 'Objective Template', and 'Budget Template'. Below these is a 'View All Questions' link. The main content area is titled 'Section 001' and 'Sub-Section 001'. It displays 'Question 4 of 5' with a 'Save' button. The question text is 'Use the search feature to find someone in the Pre-Award system.' Below the question is a text input field containing 'Sun Shine' with a search icon, a red 'x' icon, and a plus icon. At the bottom, there is a 'Choose File To Upload' button.

Figure 122: Contact Name in Answer Field

Add a New Contact

1. Click **New** . The Create New Contact dialog box appears.
2. Fill in the necessary fields.
 Note: The red asterisks indicate required fields.
3. Click **Save**. The contact's name appears in the Contact Lookup Field.

Announcement Question Types

Save Finish Later Application Report → NEXT

Application Objective Template Budget Template

View All Questions

PREVIOUS NEXT

Category 1 of 3 8% Complete

Section 001

Sub-Section 001

Question 4 of 5 Save

Question 4 *

Use the search feature to find someone in the Pre-Award system.

Search Contact [Search] [X] [Add]

Please answer this question

Choose File To Upload



Create new contact

First Name * Last Name *

Job Title * Email *

Phone Number * Fax Number

Cancel Save

Save the contact.

Figure 123: Create New Contact Question

Announcement Question Types

Save

Finish Later

Application Report

NEXT

Application

Objective Template

Budget Template

View All Questions

PREVIOUS

NEXT

Category 1 of 3

8% Complete

0

Section 001

Sub-Section 001

Question 4 of 5

Save

Question 4 *

Use the search feature to find someone in the Pre-Award system.

Sun Shine

Q

X

+

Choose File To Upload

Figure 124: New Contact Name in Answer Field

Announcement Question Types

Date

To complete this question, input a date. For example, 12/01/2021.

Note: The date fields are displayed in the mm/dd/yyyy format. You can manually type in a date or use the calendar.

The screenshot shows a web application interface for GrantVantage. At the top, there are navigation links: "Save", "Finish Later", "Application Report", and "NEXT". Below these are tabs for "Application", "Objective Template", and "Budget Template". A "View All Questions" link is also present. The main content area shows a progress bar for "Category 1 of 3" with "8% Complete" and a "NEXT" button. Below the progress bar, there is a section titled "Section 001" and a sub-section titled "Sub-Section 001". The current question is "Question 5 of 5" with a "Save" button. The question text is "Question 5 * Enter a date." Below the text is a text input field. A calendar pop-up is displayed over the input field, showing the month of January 2022. The calendar has a header with "< January 2022 >" and a grid of days from Sunday to Saturday. The days are numbered 1 through 31. The input field contains a vertical line cursor.

Save Finish Later Application Report → NEXT

Application × Objective Template × Budget Template ×

View All Questions ≡

← PREVIOUS NEXT →

← Category 1 of 3 → 8% Complete 0

Section 001

Sub-Section 001

← Question 5 of 5 → Save

Question 5 *
Enter a date.

Please answer this question

Choose File To Upload

< January 2022 >

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	26	27	28	29	30	31	1
2	2	3	4	5	6	7	8
3	9	10	11	12	13	14	15
4	16	17	18	19	20	21	22
5	23	24	25	26	27	28	29
6	30	31	1	2	3	4	5

Figure 125: Choose Date

Announcement Question Types

Date Range

To complete this question, input a date range. For example, 12/01/2021 – 11/30/2022.

Note: The date fields are displayed in the mm/dd/yyyy format. You can manually type in a date or use the calendar.

The screenshot displays the GrantVantage application interface. At the top, there is a navigation bar with a 'Save' button, a 'Finish Later' button, and an 'Application Report' button with a 'NEXT' arrow. Below this, there are tabs for 'Application', 'Objective Template', and 'Budget Template', each with a red 'x' icon. A 'View All Questions' link with a hamburger menu icon is also present. The main content area shows a progress bar for 'Category 2 of 3' with '8% Complete' and a 'NEXT' button. Below the progress bar, there is a section for 'Section 002' and 'Sub-Section 002'. A question titled 'Question 6' is displayed, asking the user to 'Enter a date range.' The question has a red asterisk indicating it is required. There are two input fields: 'Start Date' and 'End Date', both with red asterisks. A calendar widget is open over the 'Start Date' field, showing the month of January 2022. The calendar has a blue header with navigation arrows and the text 'January 2022'. The days of the week are listed at the top, and the dates are arranged in a grid. A red message 'Please answer this question' is displayed below the 'End Date' field.

Save Finish Later Application Report → NEXT

Application × Objective Template × Budget Template ×

View All Questions ☰

PREVIOUS NEXT

Category 2 of 3 8% Complete 00

Section 002

Sub-Section 002

Question 1 of 4 Save

Question 6 *

Enter a date range.

Start Date * End Date *

Please answer this question

< January 2022 >

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	26	27	28	29	30	31	1
2	2	3	4	5	6	7	8
3	9	10	11	12	13	14	15
4	16	17	18	19	20	21	22
5	23	24	25	26	27	28	29
6	30	31	1	2	3	4	5

Figure 126: Choose Date Range

Announcement Question Types

Decimal Number

To complete this question, input a decimal number.

The screenshot displays the GrantVantage application interface. At the top, there is a navigation bar with links for 'Save', 'Finish Later', 'Application Report', and 'NEXT'. Below this, there are tabs for 'Application', 'Objective Template', and 'Budget Template'. A 'View All Questions' link is also present. The main content area shows a progress bar for 'Category 2 of 3' with '8% Complete' and a '0' icon. Below the progress bar, there is a section titled 'Section 002' and a sub-section titled 'Sub-Section 002'. The current question is 'Question 2 of 4', which is a 'Decimal Number' type. The question text is 'Enter a decimal number.' and the input field contains the value '3.14'. There is a 'Save' button and a 'Choose File To Upload' button.

Figure 127: Enter Decimal

Announcement Question Types

Formatted Text

To complete this question, input text. Narrative fields may have a character limit that will display the maximum number of characters an applicant response may contain. The character limit will count down until it reaches zero (0), and the system will not allow you to continue typing. If there is no character limit it will be indicated by a double dash (--).

The screenshot shows the GrantVantage application interface. At the top, there are tabs for 'Application', 'Objective Template', and 'Budget Template'. Below these is a 'View All Questions' link. The main content area is titled 'Section 002' and 'Sub-Section 002'. It displays 'Question 8' with the prompt 'Enter text to complete the question'. Below the prompt is a rich text editor with a toolbar containing options for bold, italic, underline, strikethrough, font color, background color, text color, text size, text alignment, list creation, link, unlink, and source code. The text area is empty. At the bottom right, a red box highlights the text 'Remaining Characters: 500'.



This screenshot shows the same GrantVantage application interface as the first, but with the text 'This is example text.' entered into the text area. The red box at the bottom right now displays 'Remaining Characters: 479'.

Figure 128: Formatted Text Character Limit

Announcement Question Types

Grid – Fixed Row

To complete this question, complete the grid. You cannot add or delete fixed rows. Fields may be Date, Number, Currency, or Limited Text. Number and Currency columns may have a Total or Average section at the bottom.

Grid - Fixed Row *

Fixed Column - System Generated	Column-Name-2	Column-Name-3	Column-Name-4	Column-Name-5	Column-Name-6
Row 1	01/31/2022	34	\$ 500.00	200	01/01/2022
Row 2	02/28/2022	60	\$ 150.00	Widget	02/01/2022
Row 3	03/31/2022	72	\$ 1,000.00	739	03/01/2022
Row 4	04/30/2022	94	\$ 500.00	585	04/01/2022
Row 5	05/31/2022	27	\$ 250.00	App	05/01/2022
		Total: 287	Average: \$ 480.00		

Choose File To Upload

Figure 129: Grid – Fixed Row

Announcement Question Types

Grid - Standard

To complete this question, add or delete rows and complete the grid. Fields may be Date, Number, Currency, or Limited Text. Number and Currency columns may have a Total or Average section at the bottom.

The screenshots show the 'Grid - Standard' question type in the GrantVantage application. The top screenshot shows a single row of data with a 'Remaining Rows: 9' indicator. The bottom screenshot shows two rows of data with a 'Remaining Rows: 8' indicator. An arrow points from the top screenshot to the bottom one, indicating the progression of adding rows.

Top Screenshot Data:

Date	Number	Number with Sum	Currency	Currency with Sum	Limited Text
01/31/2022	46	78	\$ 1,000.00	\$ 500.00	Supplies
		Total: 78.00	Total: \$500.00		

Bottom Screenshot Data:

Date	Number	Number with Sum	Currency	Currency with Sum	Limited Text
01/31/2022	46	78	\$ 1,000.00	\$ 500.00	Supplies
02/28/2022	36	43	\$ 200.00	\$ 750.00	Fringe Benefits
		Total: 121.00	Total: \$1,250.00		

Figure 130: Grid – Standard

Announcement Question Types

Add a Row

1. Click **+ Add New Row**.
2. Fill in the rows. Repeat steps 1-2 for each row.

Note: If there is a row limit, it will display with the Remaining Row indicator. It counts down until you reach the limit. The system will not let you add more rows past the limit. Otherwise, there is no row limit.

The screenshots show the 'Grid Standard' question type in the GrantVantage application. The top screenshot shows a single row with the following data:

Date	Number	Number with Sum	Currency	Currency with Sum	Limited Text
01/31/2022	46	78	\$ 1,000.00	\$ 500.00	Supplies
		Total: 78.00		Total: \$500.00	

The bottom screenshot shows two rows added, with the following data:

Date	Number	Number with Sum	Currency	Currency with Sum	Limited Text
01/31/2022	46	78	\$ 1,000.00	\$ 500.00	Supplies
02/28/2022	36	43	\$ 200.00	\$ 750.00	Fringe Benefits
		Total: 121.00		Total: \$1,250.00	

Figure 131: Grid – Standard

Announcement Question Types

Grouped Questions

To complete this question, answer the grouped questions. Fields may be Date, Number, Currency, or Limited Text.

Note: If the 'N/A' option is selected, the question is greyed-out and does not require an answer.

Save Finish Later Application Report → NEXT

Application Budget Template

View All Questions

PREVIOUS NEXT

Category 1 of 1 0% Complete

New Types

New REporting

Question 10 of 12 Show Instruction Applicant Answer: Not Applicable Save

Grouped Question *

Small groups (4-6 writers) meet for a hour every week with an English Language Specialist who facilitates the group. Groups may be disciplinary or inter-disciplinary. Each week:

one or more members share a draft of something they are writingthey ask group members for feedback (e.g., Are my ideas clear? Is the paper well organized? What confused you? Is this the right word/phrase? Do you see any errors?)group members ask questions, respond to the text, make suggestions for clarification or revisionthe facilitator teaches writing techniques, strategies, and grammar points where appropriate

Please note: The facilitator's role is not to teach a writing "class" but to guide the group toward productive discussions about their writing. Ideally, writing groups become high-functioning and autonomous over time.

Name * Sun Shine Remaining Characters: 491 Applicant Answer: Not Applicable

Joining Date * 01/03/2022 Remaining Characters: 491 Applicant Answer: Not Applicable

Salary * \$ 50,000.00 Remaining Characters: 491

Mobile Number * 3031231234 Remaining Characters: 491

Choose File To Upload Remaining Characters: 980

Figure 132: Grouped Questions

Announcement Question Types

If Pick Option, Then Attach

To complete this question, choose from the picklist options. This is a single select, which means you can only select one option. Depending on which picklist you choose, you may be required to attach a document to complete the question. If the "Choose File to Upload" button appears, you must attach a document. Otherwise, the answer will not save. If the "Choose File to Upload" button does not appear, the answer saves.

1. Use the drop-down list to choose from the options.

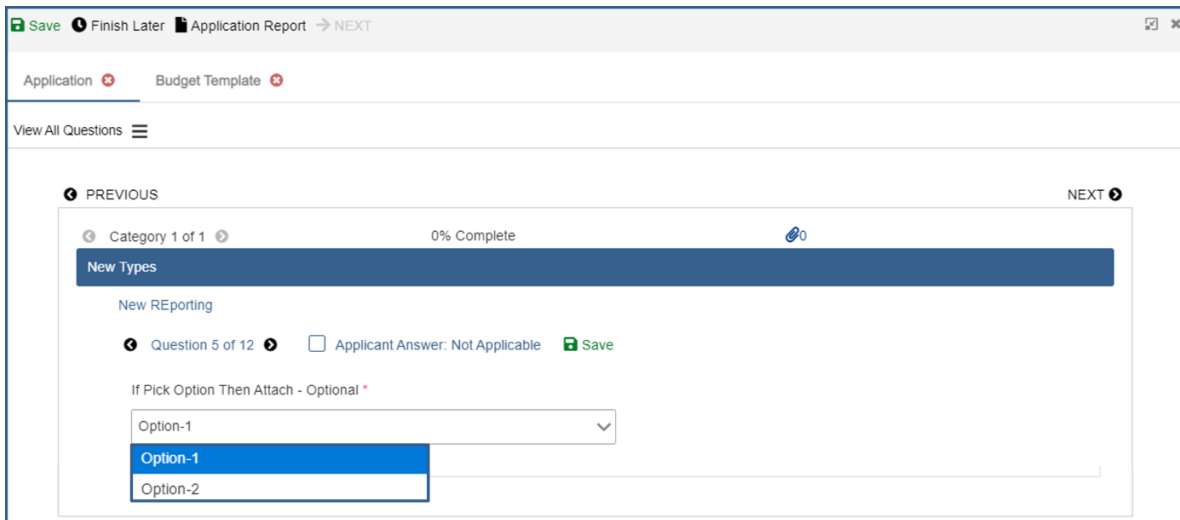
The screenshot shows a web application interface for GrantVantage. At the top, there are navigation links: 'Save', 'Finish Later', 'Application Report', and 'NEXT'. Below this, there are tabs for 'Application' and 'Budget Template'. A 'View All Questions' link is also present. The main content area shows a progress bar for 'Category 1 of 1' at '0% Complete'. Below the progress bar, there is a section titled 'New Types' with a sub-section 'New Reporting'. The current question is 'Question 5 of 12', which is 'Applicant Answer: Not Applicable'. The question title is 'If Pick Option Then Attach - Optional *'. It features a dropdown menu with 'Option-1' selected. Below the dropdown, there is a 'Choose File To Upload' button. The 'Save' button is visible at the bottom right of the question area.

Figure 133: If Pick Option, Then Attach

If there is an attachment required and you try to save the answer, the system will pop up a red warning to attach a file and not save the answer.

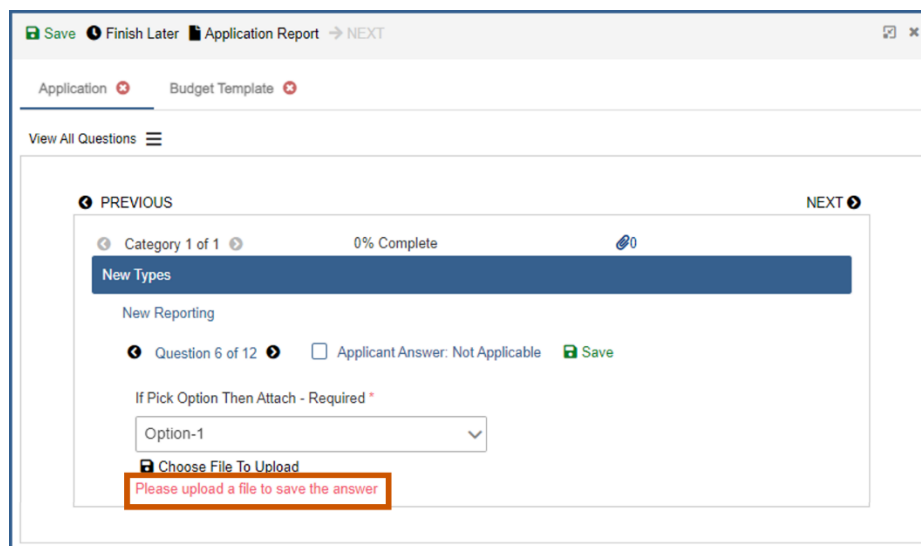



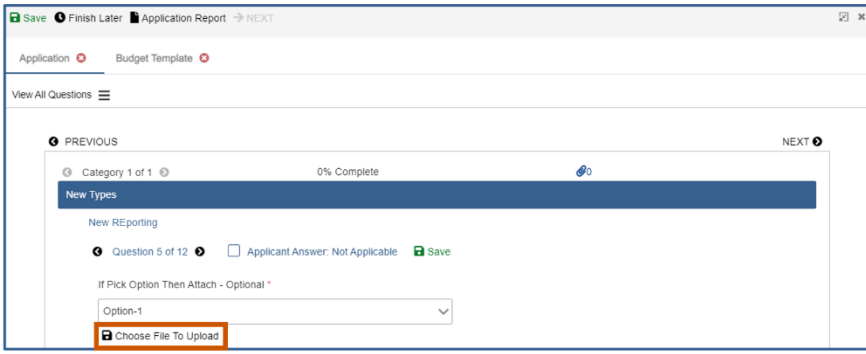
The screenshot shows the same web application interface as Figure 133, but for 'Question 6 of 12'. The question title is 'If Pick Option Then Attach - Required *'. The dropdown menu still has 'Option-1' selected. Below the dropdown, the 'Choose File To Upload' button is highlighted with a red rectangular box. Below this button, a red warning message is displayed: 'Please upload a file to save the answer'. The 'Save' button is still visible at the bottom right of the question area.

Figure 134: If Pick Option, Then Attach – Error

Announcement Question Types

2. Click  **Choose File to Upload.**
3. Choose from grid.
Or
Click  **Choose File.**
 - a. Upload the document.
 - b. Click  **Save.**
4. Click **Save.**



PREVIOUS Category 1 of 1 0% Complete NEXT

New Types

New REporting

Question 5 of 12 Applicant Answer: Not Applicable Save

If Pick Option Then Attach - Optional *

Option-1

Choose File To Upload

Documents

Document Name	Date Uploaded
Example.docx	05-18-2021
Example 2.docx	06-10-2021

Total: 2

Save the document to the grid.

Choose File Save Cancel

Close Save

Save the document(s) to the question

Figure 135: If Pick Option, Then Attach – Add Attachment

Announcement Question Types

If Pick Option, Then Checklist

To complete this question, choose from picklist options. Depending on which picklist you choose, you may be required to select options from a checklist dropdown to complete the question. If the checklist dropdown appears, you must select checklist options. Otherwise, the answer will not save. If the checklist drop-down does not appear, the answer saves.

1. Use the drop-down list to choose from the options.

The screenshot shows a web application interface for a grant application. At the top, there are tabs for 'Application' and 'Budget Template'. Below the tabs, there's a section for 'Question 7 of 12' with a progress indicator '0% Complete'. The question title is 'If Pick option then Checklist - Optional *'. The question text describes a writing group activity. Below the text, there are two dropdown menus, both showing 'Option-1' as the selected item. The interface includes navigation buttons like 'PREVIOUS', 'NEXT', and 'Save'.

Figure 136: If Pick Option, Then Checklist

2. **Optional:** Use the drop-down list to choose from the checklist.

Announcement Question Types

The screenshot displays the GrantVantage application interface. At the top, there are navigation links: 'Save', 'Finish Later', 'Application Report', and 'NEXT'. Below these, there are tabs for 'Application' and 'Budget Template'. A 'View All Questions' link is also present. The main content area is titled 'PREVIOUS' and 'NEXT'. It shows 'Category 1 of 1' and '0% Complete'. A 'New Types' section is highlighted. Under 'New Reporting', there is a 'Question 7 of 12' section. It includes a 'Show Instruction' link, a checkbox for 'Applicant Answer: Not Applicable', and a 'Save' button. The question text is: 'If Pick option then Checklist - Optional *'. The question description is: 'Small groups (4-6 writers) meet for a hour every week with an English Language Specialist who facilitates the group. Groups may be disciplinary or inter-disciplinary. Each week:'. The question options are: 'one or more members share a draft of something they are writingthey ask group members for feedback (e.g., Are my ideas clear? Is the paper well organized? What confused you? Is this the right word/phrase? Do you see any errors?)group members ask questions, respond to the text, make suggestions for clarification or revisionthe facilitator teaches writing techniques, strategies, and grammar points where appropriate'. A note states: 'Please note: The facilitator's role is not to teach a writing "class" but to guide the group toward productive discussions about their writing. Ideally, writing groups become high-functioning and autonomous over time.' Below the question, there is a dropdown menu with 'Option-1' selected. Another dropdown menu shows 'Check Option 1' selected, with 'Check Option 2' and 'Check Option 3' as options. A 'Choose File To Upload' button is at the bottom.

Figure 137: If Pick Option, Then Checklist – Checklist Options

Announcement Question Types

If Yes/No, Then Attach

To complete this question, choose yes or no. This is a single select, which means you can only select one option. Depending on which answer you choose, you may be required to attach a document to complete the question. If the "Choose File to Upload" button appears, you must attach a document. Otherwise, the answer will not save. If the "Choose File to Upload" button does not appear, the answer saves.

1. Use the drop-down list to choose yes or no.

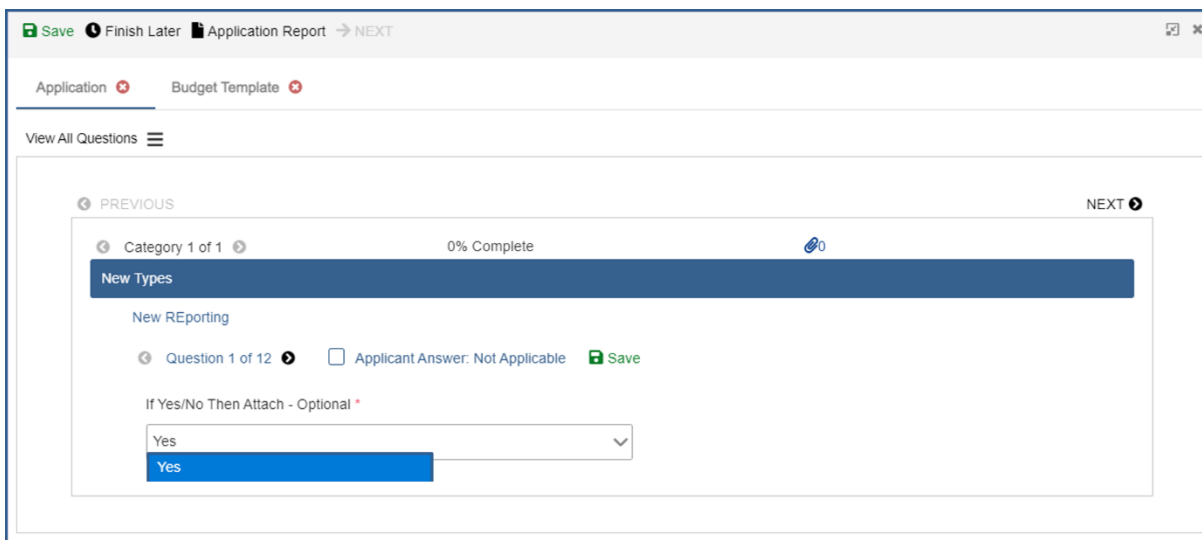
The screenshot shows a web application interface for a grant application. At the top, there are navigation links: 'Save', 'Finish Later', 'Application Report', and 'NEXT'. Below this, there are tabs for 'Application' and 'Budget Template'. A 'View All Questions' link is also present. The main content area shows a progress bar for 'Category 1 of 1' at '0% Complete'. Below the progress bar, there is a section titled 'New Types' with a sub-section 'New Reporting'. The current question is 'Question 1 of 12', and the applicant's answer is 'Not Applicable'. The question title is 'If Yes/No Then Attach - Optional'. The answer is 'Yes'.

Figure 138: If Yes/No, Then Attach

If there is an attachment required and you try to save the answer, the system will pop up a red warning to attach a file and not save the answer.

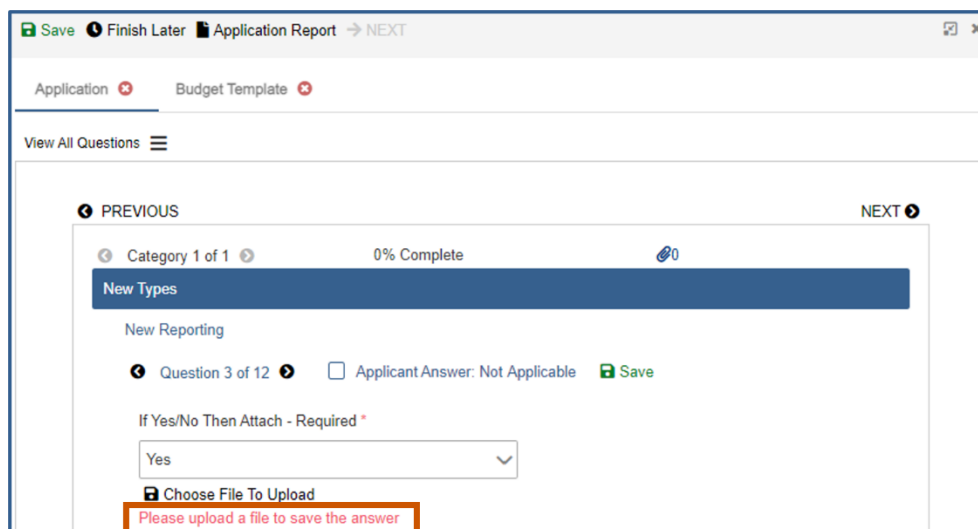



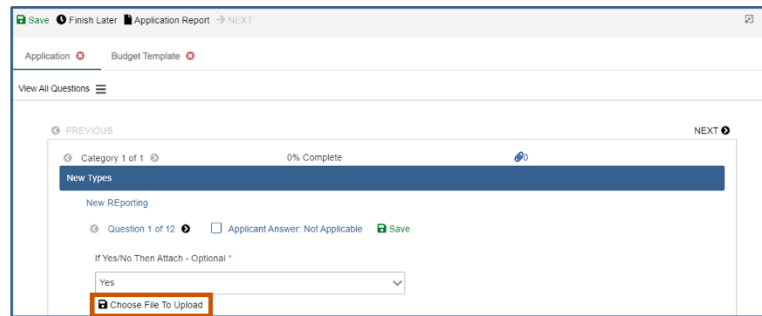
The screenshot shows the same web application interface as Figure 138, but for a different question. The question title is 'If Yes/No Then Attach - Required'. The answer is 'Yes'. Below the answer, there is a 'Choose File To Upload' button. A red warning message is displayed at the bottom: 'Please upload a file to save the answer'.

Figure 139: If Yes/No, Then Attach – Error

Announcement Question Types

2. **Optional:** Click  **Choose File to Upload.**
3. Choose from grid.
Or
Click  **Choose File.**
 - a. Upload the document.
 - b. Click  **Save.**
4. Click **Save.**



Save Finish Later Application Report → NEXT

Application Budget Template

View All Questions

PREVIOUS NEXT

Category 1 of 1 0% Complete

New Types

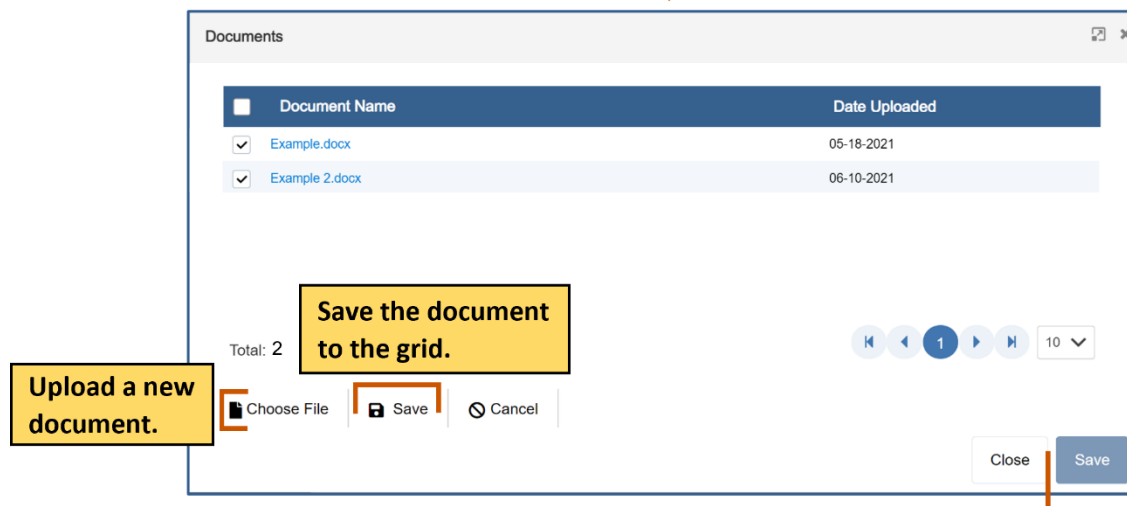
New REporting

Question 1 of 12 Applicant Answer: Not Applicable Save

If Yes/No Then Attach - Optional *

Yes

Choose File To Upload



Documents

Document Name	Date Uploaded
Example.docx	05-18-2021
Example 2.docx	06-10-2021

Total: 2

Choose File Save Cancel

Save the document to the grid.

Upload a new document.

Close Save

Save the document(s) to the question

Figure 140: If Yes/No, Then Attach – Add Attachment

Announcement Question Types

If Yes/No, Then Checklist

To complete this question, choose yes or no. This is a single select, which means you can only select one option. Depending on which answer you choose, you may be required to select options from a checklist dropdown to complete the question. If the checklist dropdown appears, you must select checklist options. Otherwise, the answer will not save. If the checklist drop-down does not appear, the answer saves.

1. Use the drop-down list to choose yes or no.

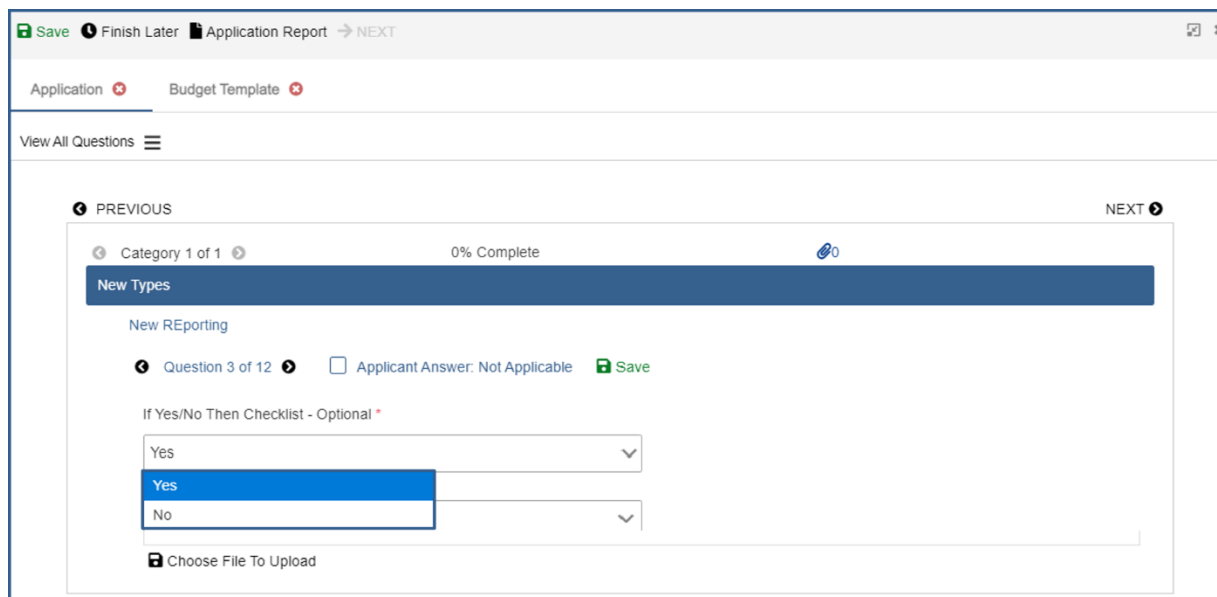
The screenshot shows a web application interface for GrantVantage. At the top, there are navigation links: 'Save', 'Finish Later', 'Application Report', and 'NEXT'. Below this, there are tabs for 'Application' and 'Budget Template'. A 'View All Questions' link is also present. The main content area is titled 'PREVIOUS' and 'NEXT'. It shows a progress bar for 'Category 1 of 1' with '0% Complete'. Below the progress bar, there is a section for 'New Types' and 'New Reporting'. The current question is 'Question 3 of 12'. The question text is 'If Yes/No Then Checklist - Optional *'. There are two dropdown menus, both with 'Yes' and 'No' options. The first dropdown menu is currently open, showing the 'Yes' option selected. Below the dropdown menus, there is a 'Choose File To Upload' button. The 'Applicant Answer: Not Applicable' checkbox is unchecked, and the 'Save' button is visible.

Figure 141: If Yes/No, Then Checklist

2. **Optional:** Use the drop-down list to choose from the checklist.

Announcement Question Types

Save Finish Later Application Report → NEXT

Application Budget Template

View All Questions

PREVIOUS NEXT

Category 1 of 1 0% Complete

New Types

New REporting

Question 3 of 12 Applicant Answer: Not Applicable Save

If Yes/No Then Checklist - Optional *

Yes

Check Option 1

☐

☒ Check Option 1

☐ Check Option 2

Choose File To Upload

Figure 142: If Yes/No, Then Checklist – Choose from Checklist

Announcement Question Types

Money

To complete this question, input a dollar amount.

The screenshot displays the GrantVantage application interface. At the top, there is a navigation bar with options: 'Save' (green icon), 'Finish Later' (clock icon), 'Application Report' (document icon), and 'NEXT' (arrow icon). Below this, there are tabs for 'Application' (with a red 'x'), 'Objective Template' (with a red 'x'), and 'Budget Template' (with a red 'x'). A 'View All Questions' link with a hamburger menu icon is also present. The main content area shows a progress indicator: 'Category 2 of 3' (with left and right arrows), '8% Complete', and a blue progress bar. Below the progress bar, it says 'Section 002' and 'Sub-Section 002'. The current question is 'Question 4 of 4' (with left and right arrows) and 'Question 9 *'. The instruction is 'Enter a dollar amount.' The input field contains '\$ 90,000,000,000.00' and is highlighted with an orange border. Below the input field is a 'Choose File To Upload' button with a document icon. Navigation buttons 'PREVIOUS' and 'NEXT' are located at the top of the question area.

Figure 143: Enter Dollar Amount

Announcement Question Types

Number

To complete this question, input a number.

The screenshot displays the GrantVantage application interface. At the top, there is a navigation bar with 'Save', 'Finish Later', 'Application Report', and 'NEXT' buttons. Below this, there are tabs for 'Application', 'Objective Template', and 'Budget Template'. A 'View All Questions' link is also present. The main content area shows a 'PREVIOUS' and 'NEXT' navigation bar. Below this, there is a 'Category 3 of 3' section with '8% Complete' and a '0' score. A 'Section 3' header is followed by a 'Sub Section 3' header. The question is labeled 'Question 1 of 4' and 'Question 10 *'. The prompt is 'Enter a number.' and the input field contains the value '8047'. There is a 'Save' button and a 'Choose File To Upload' button.

Figure 144: Enter Number

Announcement Question Types

Percentage

To complete this question, input a percentage.

The screenshot displays the GrantVantage application interface. At the top, there is a navigation bar with a 'Save' button, a 'Finish Later' button, and an 'Application Report' button with a 'NEXT' arrow. Below this, there are tabs for 'Application', 'Objective Template', and 'Budget Template'. A 'View All Questions' link is also present. The main content area shows a 'PREVIOUS' button and a 'NEXT' button. The current question is 'Question 11', which is a percentage question. The question text is 'Enter a percentage.' and the input field contains '100.00%'. Below the input field is a 'Choose File To Upload' button. The interface also shows 'Section 3' and 'Sub Section 3'.

Figure 145: Percentage

Announcement Question Types

Picklist

To complete this question, choose from a picklist. This is a single select, which means you can only select one option.

The screenshot displays the GrantVantage application interface. At the top, there are navigation links: 'Save' (with a green icon), 'Finish Later' (with a clock icon), 'Application Report' (with a bar chart icon), and 'NEXT' (with a right arrow icon). Below these are tabs for 'Application', 'Objective Template', and 'Budget Template', each with a red 'x' icon. A 'View All Questions' link with a hamburger menu icon is also present. The main content area shows a progress bar for 'Category 3 of 3' with '15% Complete' and a '0' icon. Below the progress bar is a blue header for 'Section 3' and a sub-header for 'Sub Section 3'. The question is labeled 'Question 3 of 4' with a 'Save' button. The question text is 'Quesyion 12 *' (note the typo) followed by 'Use the picklist to answer the question.' Below this is a picklist dropdown menu with 'Yes' selected and 'No' as an option.

Figure 146: Choose from Picklist

Announcement Question Types

Small Text

To complete this question, enter text. This is an unformatted text box. Narrative fields may have a character limit that will display the maximum number of characters an applicant response may contain. The character limit will count down until it reaches zero (0), and the system will not allow you to continue typing. If there is no character limit it will be indicated by a double dash (-).

The figure consists of two screenshots of the GrantVantage application interface, connected by a downward-pointing arrow. Both screenshots show the same navigation bar at the top with 'Save', 'Finish Later', 'Application Report', and 'NEXT' buttons. Below the navigation bar are tabs for 'Application', 'Objective Template', and 'Budget Template'. A 'View All Questions' link is also present. The main content area shows a progress indicator for 'Category 3 of 3' (15% Complete) and 'Section 3'. The question being edited is 'Question 13' (Question 4 of 4). The question text is 'Enter text to complete the question.' Below the question text is a large text input box. In the top screenshot, the input box is empty, and a red box highlights the 'Remaining Characters: 100' indicator. In the bottom screenshot, the input box contains the text 'This is example text.', and the red box highlights the 'Remaining Characters: 79' indicator. A 'Choose File To Upload' button is located below the input box in both screenshots.

Figure 147: Small Text Character Limit

Objective Tools

You can add, edit, or delete parts of the Objective template. Use the arrows to expand the list of objectives, performance measures, and grant activities. When you are done modifying the Objective template, save it to lock it.

Command bar

Use the arrow to expand the list.

Add a goal.

Edit or delete the objective.

Use the arrow to expand the list.

Update Objective

Close Minimize

Save Objective Objective Instructions

☒ Goal + Add Goal

Goal Name	Goal Description	Start Date	End Date
Existing Objective			

Objectives (1)

Objective Number	Ref. Id	Objective Name	Objective Description	Manager	Start Date	End Date	
1	2491	HTS_TST & HTS_POS	HTS_TST & HTS_POS	Falguni Patel	10/01/2020	10/31/2020	

Performance Measure (4) + Add Measure

Ref. Id	Performance Measure	Manager	Type	Planned	Actual	Active	
1417_1	Describe the sources for the data that you are reporting	Falguni Patel	Narrative			Not Started	

Grant Activities (2) + Add Activity

Ref. Id	Grant Activities	Manager	Start	Due Date	Active	
8.1	8.1: Conducting onsite reorientations in index testing and strengthening PITC and use of Screening tool in supported sites	Falguni Patel	10/01/2020	10/13/2020	Not Started	
8.2	8.2: Conduct District Supportive Supervision	Falguni Patel	10/01/2020	10/14/2020	Not Started	

Figure 148: Goals and Objectives

Use the arrow to expand the list of performance measures.

Update Objective Close Minimize

☒ Goal + Add Goal Save Objective Objective Instructions

Goal Name	Goal Description	Start Date	End Date
Existing Objective			

Objectives (1)

Objective Number	Ref. Id	Objective Name	Objective Description	Manager	Start Date	End Date
1	2491	HTS_TST & HTS_POS	HTS_TST & HTS_POS	Falguni Patel	10/01/2020	10/31/2020

Performance Measure (4) + Add Measure

Ref. Id	Performance Measure	Manager	Type	Planned	Actual	Active
1417_1	Describe the sources for the data that you are reporting	Falguni Patel	Narrative			Not Started

Grant Activities (2) + Add Activity

Ref. Id	Grant Activities	Manager	Start	Due Date	Active
8.1	8.1: Conducting onsite reorientations in index testing and strengthening PITC and use of Screening tool in supported sites	Falguni Patel	10/01/2020	10/13/2020	Not Started
8.2	8.2: Conduct District Supportive Supervision	Falguni Patel	10/01/2020	10/14/2020	Not Started

Add a performance measure.

Edit or delete the performance measure.

Figure 149: Performance Measures

Update Objective Close Minimize

Save Objective Objective Instructions

☒ Goal + Add Goal

Goal Name	Goal Description	Start Date	End Date
Existing Objective			

Objectives (1)

Objective Number	Ref. Id	Objective Name	Objective Description	Manager	Start Date	End Date
1	2491	HTS_TST & HTS_POS	HTS_TST & HTS_POS	Falguni Patel	10/01/2020	10/31/2020

☒ Performance Measure (4) + Add Measure

Ref. Id	Performance Measure	Manager	Type	Planned	Actual	Active
1417_1	Describe the sources for the data that you are reporting	Falguni Patel	Narrative			Not Started

☒ Grant Activities (2) + Add Activity

Ref. Id	Grant Activities	Manager	Start	Due Date	Active
8.1	8.1: Conducting onsite reorientations in index testing and strengthening PITC and use of Screening tool in supported sites	Falguni Patel	10/01/2020	10/13/2020	Not Started
8.2	8.2: Conduct District Supportive Supervision	Falguni Patel	10/01/2020	10/14/2020	Not Started

Use the arrow to expand the list of grant activities.

Edit or delete grant activity.

Figure 150: Grant Activities

Add a Goal

You can only add a goal if the Goal checklist is ticked.

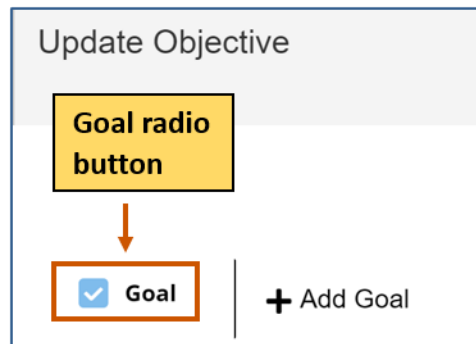


Figure 151: Goal Radio Button

1. Click **+ Add Goal**. The Goal dialog box appears.
2. Fill in the necessary fields.
Note: The red asterisks indicate required fields.
3. Click **Save**. The goal appears in the grid. Repeat steps 1-3 for each goal you wish to add.

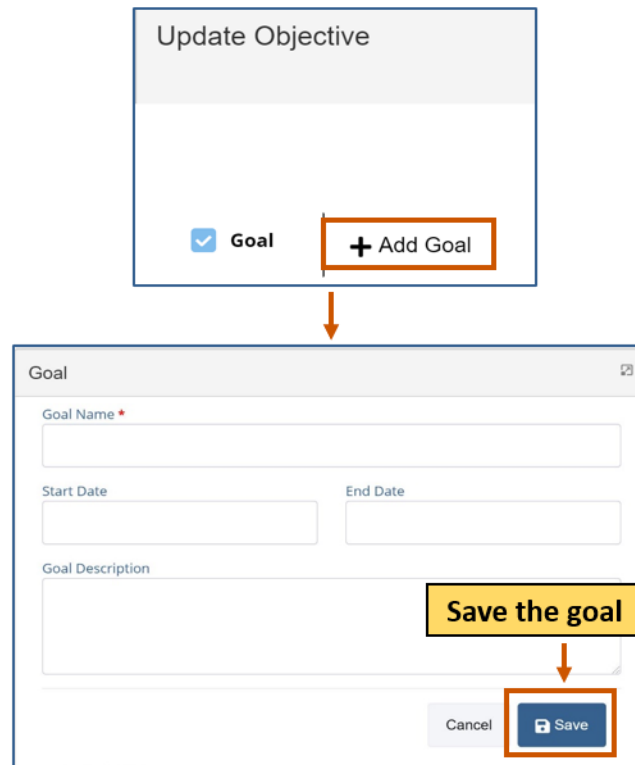


Figure 152: Add Goal

Add an Objective

1. **Optional:** Use the arrow next to the goal to expand the goal's objectives.
2. Click **+ Add Objective**. The Objective dialog box appears.

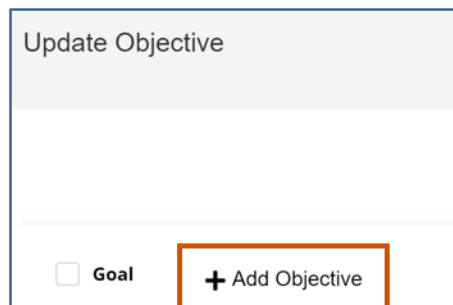


Figure 153: Add Objective

3. Fill in the necessary fields.
4. Click **Save**. The objective appears in the grid. Repeat steps 2-4 for each objective you wish to add.

A screenshot of the "Objective" dialog box. It contains several input fields: "Objective Name" (with a red asterisk), "Objective Number" (with a red asterisk), "Objective Start Date" (with a red asterisk), "Objective End Date" (with a red asterisk), "Goal" (with a red asterisk and a dropdown arrow), "Manager" (with a red asterisk and a dropdown arrow showing "--Select Manager--"), "Ref. Id", and "Objective Description" (with a red asterisk). At the bottom right, there are "Cancel" and "Save" buttons. The "Save" button is highlighted with an orange box. A yellow callout box with an arrow points to the "Save" button, containing the text "Save the new objective."

Figure 154: Objective Dialog Box

Add a Performance Measure

1. **Optional:** Use the arrow next to the goal to expand the goal's objectives.
2. Use the arrow next to the objective to expand the list.
3. Click **+ Add Measure**. The Performance Measure dialog box appears.

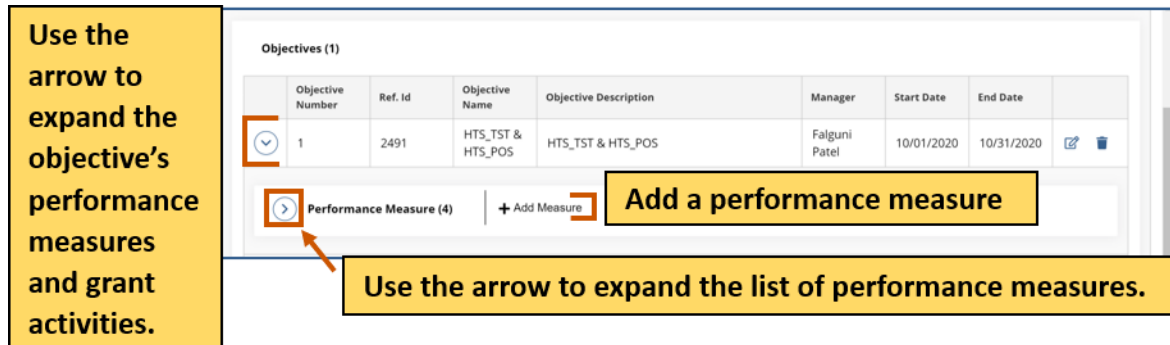


Figure 155: Add Measure

4. Fill in the necessary fields.
5. Click **Save**. The performance measure appears in the grid. Repeat steps 3-5 for each performance measure you wish to add.

Performance Measure

Measure Description *

Type of Measure * Number

Manager * --Select Manager--

Start Date * End Date *

Reference ID

Planned * Actual

Execution * Results

(Actual Amount entered manually by the user)

Cancel Save

This field is grayed-out unless you choose Actual from the Execution field.

Save the new performance measure.

Figure 156: Performance Measure Dialog Box

Add a Grant Activity

1. **Optional:** Use the arrow to expand the goal's objectives.
2. Use the arrow next to the objective to expand the list.
3. Click **+ Add Activity**. The Grant Activity dialog box appears.

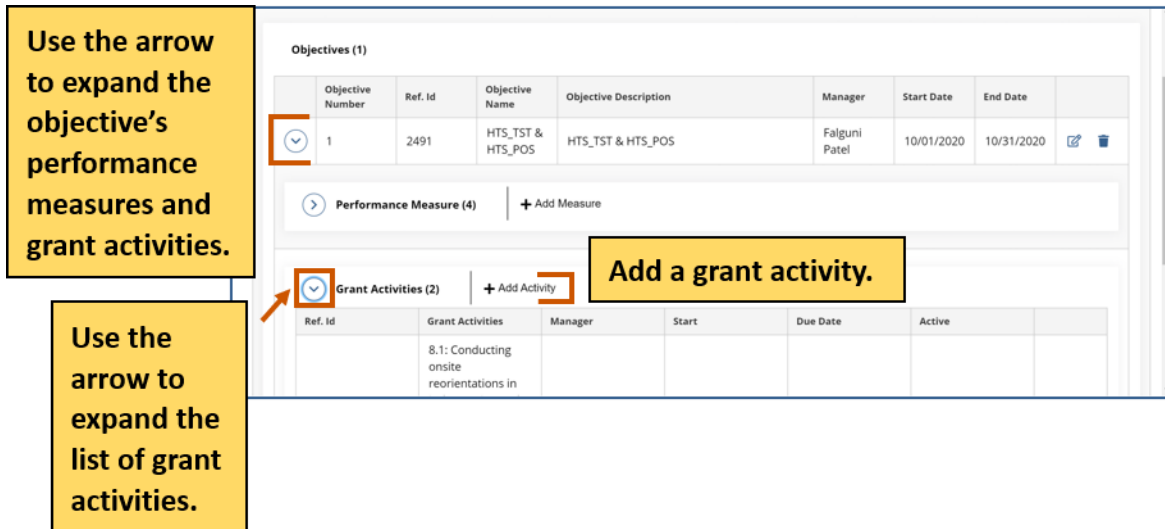


Figure 157: Add Activity

4. Fill In the necessary fields.
Note: The red asterisks indicate required fields.
5. Click **Save**. The grant activity appears in the grid. Repeat steps 2-5 for each grant activity you wish to add.

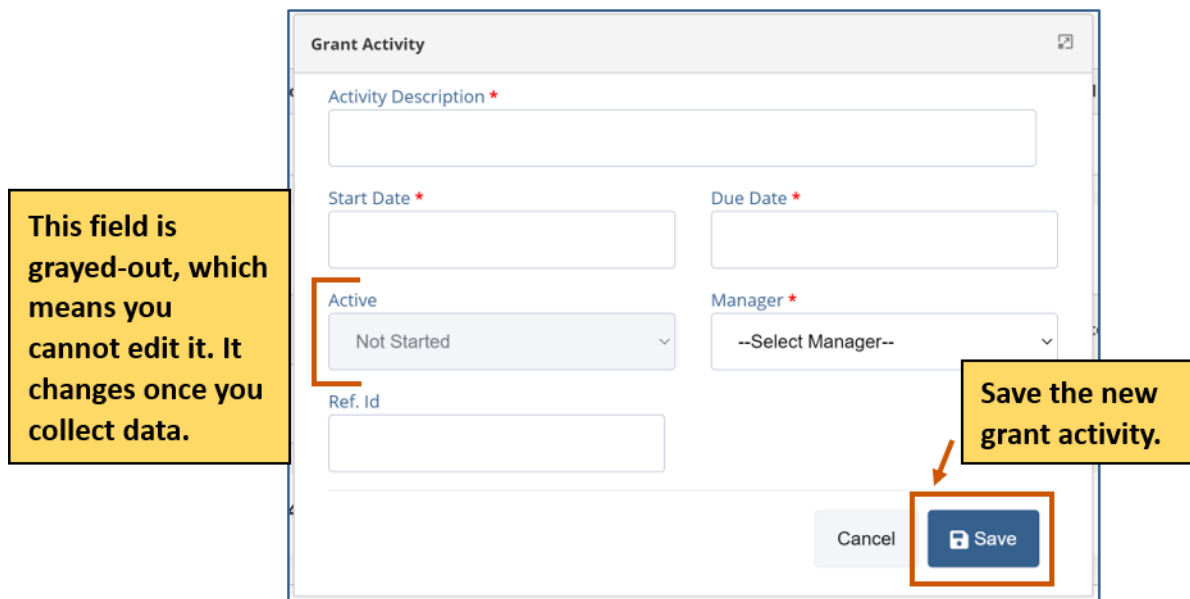





Figure 158: Grant Activity Dialog Box

Edit an Objective


1. **Optional:** Use the arrow next to the goal to expand the goal's objectives.
2. Use the arrow next to the objective to expand the list.
3. Choose the objective you wish to modify.
4. Click **Edit** . The Objective dialog box appears.

Use the arrow to expand the objective's performance measures and grant activities.

Goal		+ Add Objective							
	Objective Number	Ref. Id	Objective Name	Objective Description	Manager	Start Date	End Date		
	4	General Population	Engage Local Stakeholders	Engaging with local stakeholders to remove all barriers to access for persons seeking recovery from opioid and stimulant use disorders	To Be Determined	01/28/2020	12/30/2021		

Edit the objective.

Figure 159: Edit Objective

5. Edit the necessary fields.
6. Click **Save** . The changes to the objective appear in the grid. Repeat steps 3-6 for each objective you wish to modify.

Objective

Objective Name *

Objective Number *

Objective Start Date *

Objective End Date *

Goal *

Manager *

Ref. Id

--Select Manager--

Objective Description *


Cancel

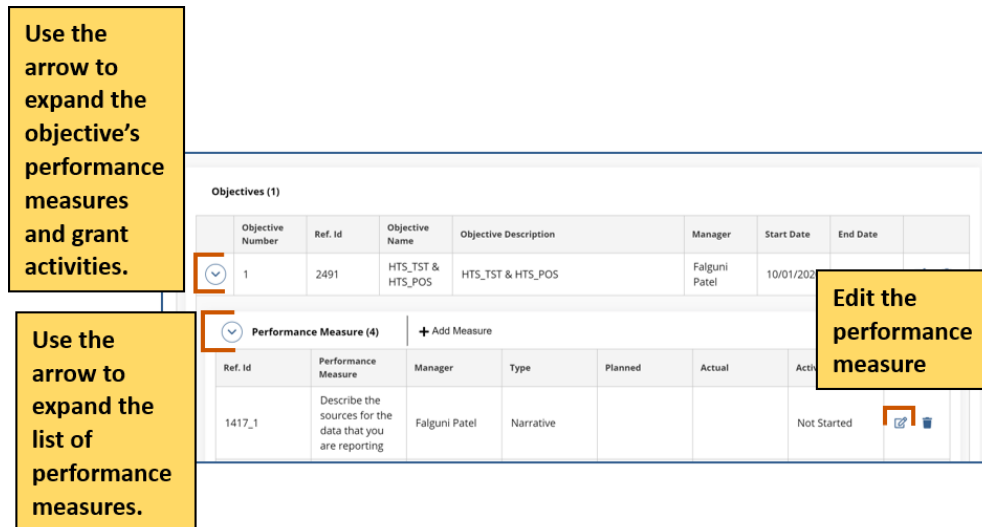
Save

Save the new objective.

Figure 160: Objective Dialog Box

Edit a Performance Measure

1. **Optional:** Use the arrow next to the goal to expand the goal's objectives.
2. Use the arrow next to the objective to expand the list.
3. Use the arrow next to the performance measure to expand the list.
4. Choose the performance measure you wish to modify.
5. Click **Edit** . The Performance Measure dialog box appears.



Use the arrow to expand the objective's performance measures and grant activities.

Use the arrow to expand the list of performance measures.

Edit the performance measure

Objectives (1)							
Objective Number	Ref. Id	Objective Name	Objective Description	Manager	Start Date	End Date	
1	2491	HTS_TST & HTS_POS	HTS_TST & HTS_POS	Falguni Patel	10/01/2023		




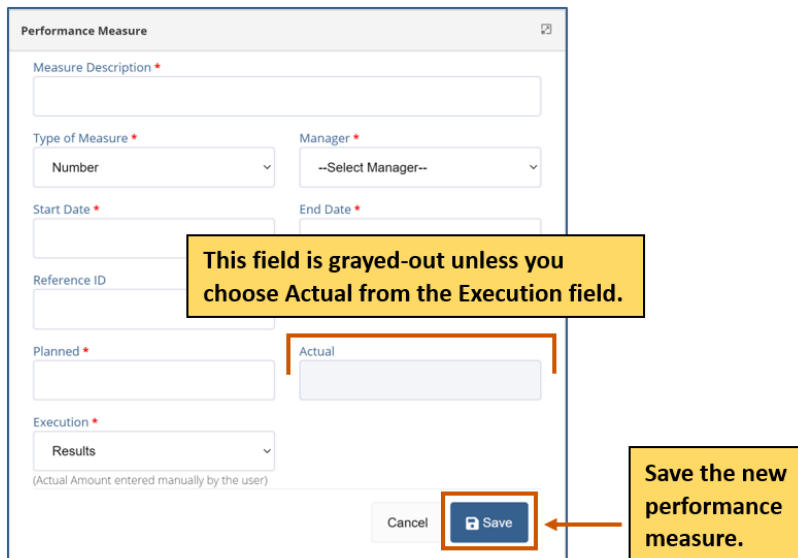
Performance Measure (4)							
Ref. Id	Performance Measure	Manager	Type	Planned	Actual	Actual	
1417_1	Describe the sources for the data that you are reporting	Falguni Patel	Narrative				Not Started  

Figure 161: Edit Performance Measure

6. Edit the necessary fields.
7. Click **Save** . The changes to the performance measure appear in the grid. Repeat steps 4-7 for each performance measure you wish to modify.



Performance Measure

Measure Description *

Type of Measure * Manager *

Number --Select Manager--

Start Date * End Date *

Reference ID

Planned * Actual

Execution * Results

(Actual Amount entered manually by the user)


Cancel **Save**

This field is grayed-out unless you choose Actual from the Execution field.



Save the new performance measure.

Figure 162: Performance Measure Dialog Box

Edit a Grant Activity



1. **Optional:** Use the arrow next to the goal to expand the goal's objectives.
2. Use the arrow next to the objective to expand the list.
3. Use the arrow next to the grant activity to expand the list.
4. Choose the grant activity you wish to modify.
5. Click **Edit** . The Grant Activity dialog box appears.

Use the arrow to expand the objective's performance measures and grant activities.

Objective Number	Ref. Id	Objective Name	Objective Description	Manager	Start Date	End Date	
4	General Population	Engage Local Stakeholders	Engaging with local stakeholders to remove all barriers to access for persons seeking recovery from opioid and stimulant use disorders	To Be Determined	01/28/2020	12/30/2021	 

Performance Measure (1) [+ Add Measure](#)


Grant Activities (1) [+ Add Activity](#)

Ref. Id	Grant Activities	Manager	Start	Due Date	Act	
General Population	Develop Advertising for promoting recovery-related events	To Be Determined	01/28/2020	12/30/2021	Not Started	 

Use the arrow to expand the list of grant activities.

Edit the grant activity.

Figure 163: Edit Grant Activity

6. Edit the necessary fields.
7. Click **Save** . The changes to the grant activity appear in the grid. Repeat steps 4-7 for each grant activity you wish to modify.

Grant Activity

Activity Description *

Start Date * Due Date *

Active Manager *

Not Started --Select Manager--

Ref. Id


This field is grayed-out, which means you cannot edit it. It changes once you collect data.

Save the new grant activity.

Cancel Save

Figure 164: Grant Activity Dialog Box

Delete an Objective

1. **Optional:** Use the arrow next to the goal to expand the goal's objectives.
2. Use the arrow next to the objective to expand the list.
3. Choose the objective you wish to delete.
4. Click **Delete** . A warning appears asking if you are sure you want to delete the objective.

Use the arrow to expand the objective's performance measures and grant activities.

Goal


+ Add Objective

	Objective Number	Ref. Id	Objective Name	Objective Description	Manager	Start Date	End Date	
	4	General Population	Engage Local Stakeholders	Engaging with local stakeholders to remove all barriers to access for persons seeking recovery from opioid and stimulant use disorders	To Be Determined	01/28/2020	12/30/2021	 

Delete the objective

Figure 165: Delete Objective

5. Click **Yes**. The objective disappears from the grid. Repeat steps 3-5 for each objective you wish to delete.



Are you sure?


Do you really want to delete the Objective(s)

Yes

No

Figure 166: Warning to Delete Objective

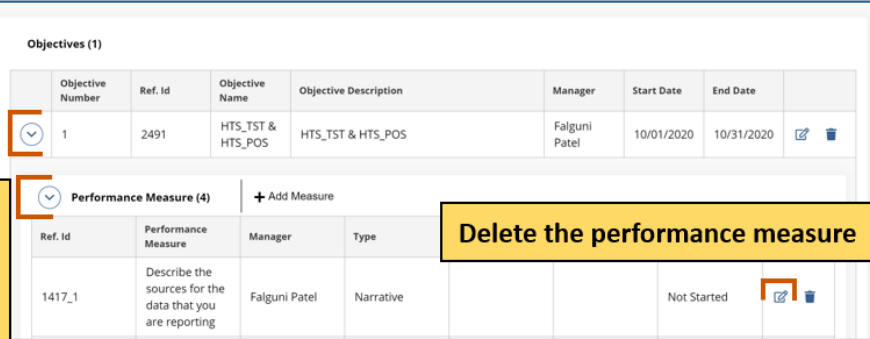
Delete a Performance Measure



1. **Optional:** Use the arrow next to the goal to expand the goal's objectives.
2. Use the arrow next to the objective to expand the list.
3. Use the arrow next to the performance measure to expand the list.
4. Choose the performance measure you wish to delete.
5. Click **Delete** . A warning appears asking if you are sure you want to delete the performance measure.

Use the arrow to expand the objective's performance measures and grant activities.

Use the arrow to expand the list of performance measures.

Delete the performance measure



Objective Number	Ref. id	Objective Name	Objective Description	Manager	Start Date	End Date	
1	2491	HTS_TST & HTS_POS	HTS_TST & HTS_POS	Falguni Patel	10/01/2020	10/31/2020	 




Ref. id	Performance Measure	Manager	Type	
1417_1	Describe the sources for the data that you are reporting	Falguni Patel	Narrative	 

Figure 167: Delete Performance Measure

6. Click **Yes**. The performance measure disappears from the grid. Repeat steps 4-6 for each performance measure you wish to delete.




Are you sure?

Do you really want to delete the Performance Measure(s)

Yes No

Figure 168: Warning to Delete Performance Measure

Delete a Grant Activity

1. **Optional:** Use the arrow next to the goal to expand the goal's objectives.
2. Use the arrow next to the objective to expand the list.
3. Use the arrow next to the grant activity to expand the list.
4. Choose the grant activity you wish to delete.
5. Click **Delete** . A warning appears asking if you are sure you want to delete the grant activity.

Use the arrow to expand the objective's performance measures and grant activities.

Use the arrow to expand the list of grant activities.

	Objective Number	Ref. Id	Objective Name	Objective Description	Manager	Start Date	End Date	
<div><div></div></div>	4	General Population	Engage Local Stakeholders	Engaging with local stakeholders to remove all barriers to access for persons seeking recovery from opioid and stimulant use disorders	To Be Determined	01/28/2020	12/30/2021	<div><div></div><div></div></div>

>

Performance Measure (1)

+ Add Measure

Grant Activities (1)

+ Add Activity


Ref. Id	Grant Activities	Manager	Start	Due Date	Acti	
General Population	Develop Advertising for promoting recovery-related events	To Be Determined	01/28/2020	12/30/2021	Not Started	<div><div></div><div></div></div>

Delete the grant activity

Delete the grant activity

Figure 169: Delete Grant Activity

6. Click **Yes**. The grant activity disappears from the grid. Repeat steps 4-6 for each grant activity you wish to delete.



Are you sure?

Do you really want to delete the Grant Activities(s)

Yes
No

Figure 170: Warning to Delete Grant Activity

Budget Tools

Note: The items you can add/change depend on the properties selected when the announcement was made.

You can add, edit, or delete parts of the Budget Template. Enter the amounts of money in the cells that are white. Cells that are light blue are not editable. You can also add sub-categories and sub-sub-categories, edit sub-categories and sub-sub-categories, and/or delete sub-categories and sub-sub-categories. Click the green **Budget Justification** icon to show budget calculations and the budget narrative.

The screenshot shows the Budget Tools interface. At the top, there are buttons for 'Save', 'Finish Later', and 'App'. Below these are input fields for 'Project Name' (set to 'Better Education for Neighborhood Kids') and 'Year' (set to 'Year 1'). To the right are 'Save Budget' and 'Budget Instructions' buttons. A table below shows budget categories: 'Personnel' (expanded), 'Project Manager', 'Personnel - other', 'Salary by Position', 'Fringe Benefits', and 'Travel'. The table has columns for 'Direct' and 'Total'. Annotations include: 'Use the drop-down list to choose a budget year.' pointing to the Year dropdown; 'View the Budget Instructions for specific guidelines to prepare your budget for submission.' pointing to the Budget Instructions button; 'Budget tools' pointing to the table; and 'Single-click the green Budget Justification icon next to a category to show budget calculations and the budget narrative.' pointing to the green icon next to 'Personnel - other'.

Use the drop-down list to choose a budget year.

View the Budget Instructions for specific guidelines to prepare your budget for submission.

Budget tools

Single-click the green Budget Justification icon next to a category to show budget calculations and the budget narrative.

Figure 171: Budget Tools

The screenshot shows the 'View Budget Calculations' interface. It has three tabs: 'Budget Justification', 'Budget Calculations', and 'Budget Narrative'. The 'Budget Justification' tab is active, showing a table with columns for 'Name of category.', 'Budget calculations', and 'Notes about the justification(s) for the change(s)'. The table has one row for 'Project Director'. Annotations include: 'Name of category.' pointing to the first column; 'Budget calculations' pointing to the second column; and 'Notes about the justification(s) for the change(s)' pointing to the third column.

Name of category.

Budget calculations

Notes about the justification(s) for the change(s).

Figure 172: View Budget Calculations

Add Budget Calculations and Budget Narratives

1. **Single-click** the green BN symbol next to a category. The Budget Categories dialog box.

Note: The dialog box fields are different based on the budget category.

The screenshot shows a table titled "Budget Categories" with columns: Direct, Cash Match, In-Kind Match, Total, and Leveraged. The table lists categories like BN Fringe, Supplies, Widgets, Laser Mouse, Widgets - other, and Supplies - other. A callout box highlights the "BN Widgets - other" row, showing a detailed view of the category list. A yellow box with an arrow points to the green "BN" symbol next to "Widgets - other" with the text: "Single-click the green BN symbol next to a category to display budget calculations and the budget narrative."

Budget Categories	Direct	Cash Match	In-Kind Match	Total	Leveraged
BN Fringe					
▼ Supplies	\$ 0.00	\$ 0.00	\$ 0.00		\$ 0.00
▼ Widgets	\$ 0.00	\$ 0.00	\$ 0.00		\$ 0.00
BN Laser Mouse					
BN Widgets - other					
BN Supplies - other					
Total	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

Figure 173: Add Budget Calculations and Narrative


2. Fill in the necessary fields and add the appropriate information.

Example dialog box

The dialog box titled "Budget Categories" contains the following fields:

- Budget Category (dropdown menu)
- Total Cost (\$ 0.00)
- Cash Match Funds (\$ 0.00)
- In-Kind Match Funds (\$ 0.00)
- Total Requested Amount (\$ 0.00)
- Budget Narrative (text area)
- Buttons: Cancel, Save

Figure 174: Budget Categories Dialog Box

3. Click  **Save**. The budget calculations and budget narrative appears in the table at the bottom of the page. Repeat steps 1-3 for each budget calculation and narrative.

Budget Categories		Budget Calculations		Budget Narrative
Fringe	Displays the budget category	Displays the total amount of budget calculations	Total Cost: \$0.00 Cash Match Funds: \$100.00 In-Kind Match Funds: \$1,000.00 Total Requested Amount: \$0.00	Example test.
				Displays the budget narrative about the specific budget category

Figure 175: Save Budget Calculations and Narrative

Add a Parent Category

1. Hover over a parent category to display the budget tools.
2. Hover over **New +**.
3. Click **New Parent Category**.

Budget Categories	Direct	Cash Match	In-Kind Match	Total	Leveraged
BN Fringe					
BN Supplies					
Total					

↑ ↓ ✎ + 🗑

Add a parent category.

New Parent Category

New Sub-Category

\$ 0.00 \$ 0.00 \$ 0.00 \$ 0.00

Figure 176: Add Parent Category

4. Type in the new name for the parent category.
5. Click **Save** 📁.

Budget Categories

BN Fringe

↑ ↓ ✎ + 🗑

Type the name of the parent category.

Save the parent category.

Figure 177: Save Parent Category

Edit a Parent Category

1. Hover over a parent category to display the budget tools.
2. Click **Edit** ✎.

Expand All

▼ Personnel

► Project Director

✎ + 🗑

Click the blue arrow to expand the list.

Edit the parent category.

Figure 178: Edit Parent Category

3. Type in the new name for the parent category.
4. Click **Save** 📁. The new parent category appears.

Budget Categories

BN Fringe

↑ ↓ ✎ + 🗑

Type the name of the parent category.

Save the parent category.

Figure 179: Save Parent Category

Delete a Parent Category


1. Hover over a parent category to display the budget tools.
2. Click **Delete** . A popup appears asking if you are sure you want to delete the sub-category.



Figure 180: Delete Parent Category

3. Click **Yes**. The parent category is deleted.

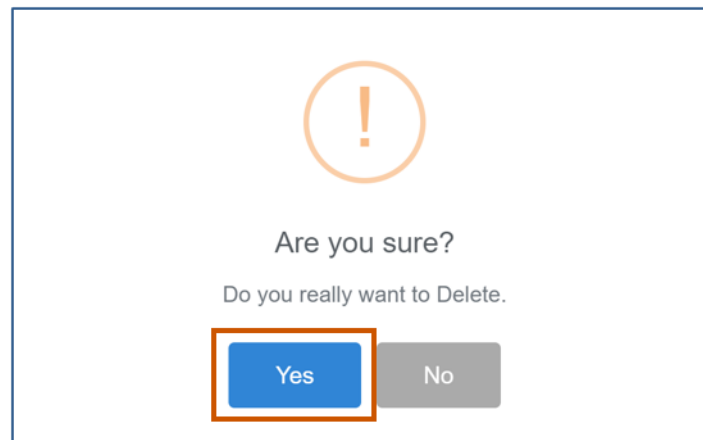


Figure 181: Warning to Delete Category

Add a Sub-Category

1. Click the blue arrow next to a parent category to expand the list.
2. Hover over a sub-category to display the budget tools.
3. Hover over **New +**.
4. Click **New sub-Category**.

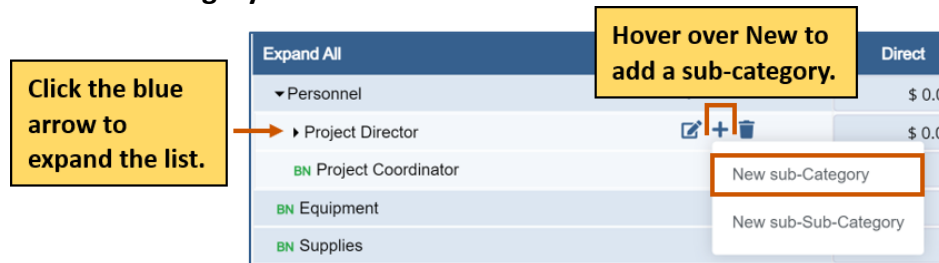



Figure 182: Add Sub-Category

5. Type in the name of the sub-category.
6. Click **Save** . The sub-category is added to the grid.

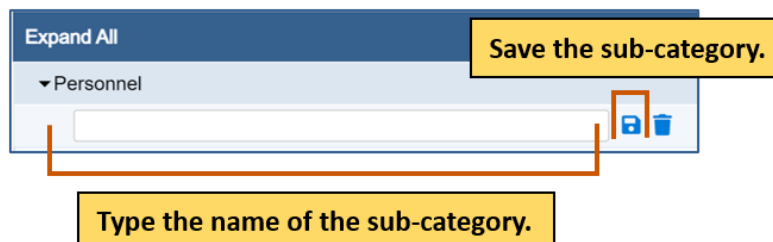



Figure 183: Save Sub-Category

Edit a Sub-Category

1. Click the blue arrow next to a parent category to expand the list.
2. Hover over a sub-category to view the budget tools.
3. Click **Edit** .

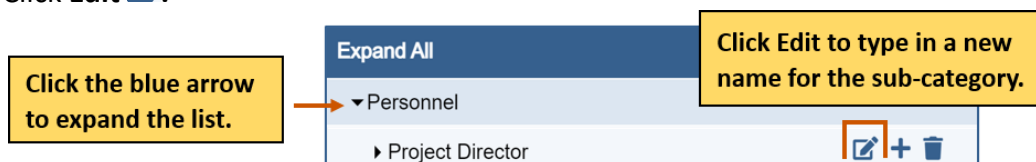



Figure 184: Edit Sub-Category

4. Type in the name of the sub-category.
5. Click **Save** .

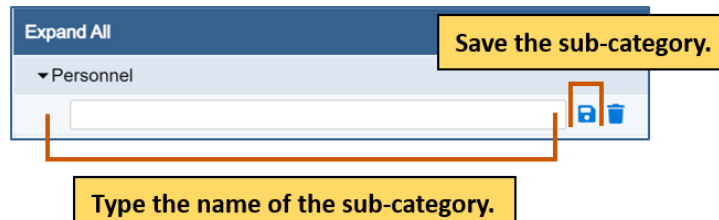


Figure 185: Save Sub-Category

Delete a Sub-Category


1. Click the blue arrow next to a parent category to expand the list.
2. Hover over a sub-category to display the budget tools.
3. Click **Delete** . A popup appears asking if you are sure you want to delete the sub-category.



Figure 186: Delete Sub-Category

4. Click **Yes**. The sub-category is deleted.

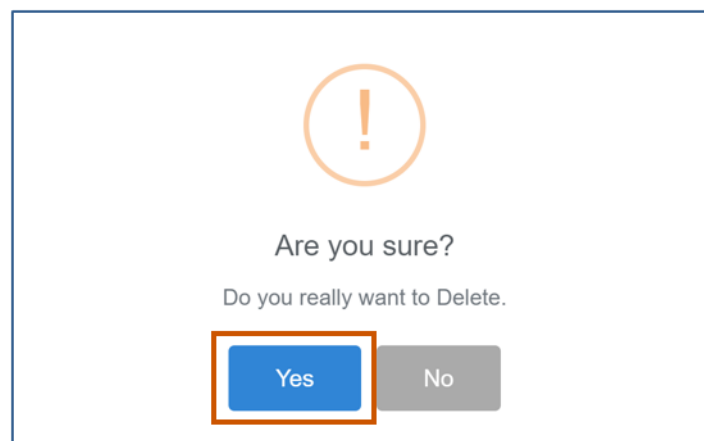


Figure 187: Warning to Delete Category

Add a Sub-Sub-Category

1. Click the blue arrow next to a budget category to expand the list.
2. Click the blue arrow next to a sub-category category to expand the list.
3. Hover over **New** +.
4. Click **New sub-Sub-Category**. The new sub-category is added to the grid.

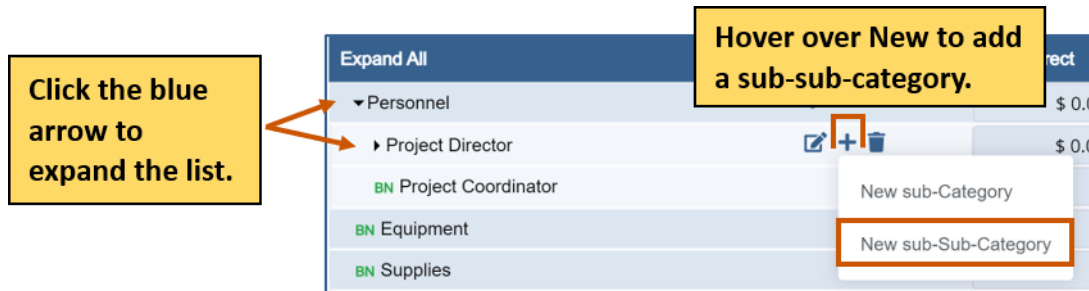


Figure 188: Add Sub-Sub-Category

5. Type in the name of the sub-category.
6. Click **Save** . The new sub-sub-category is added to the grid.

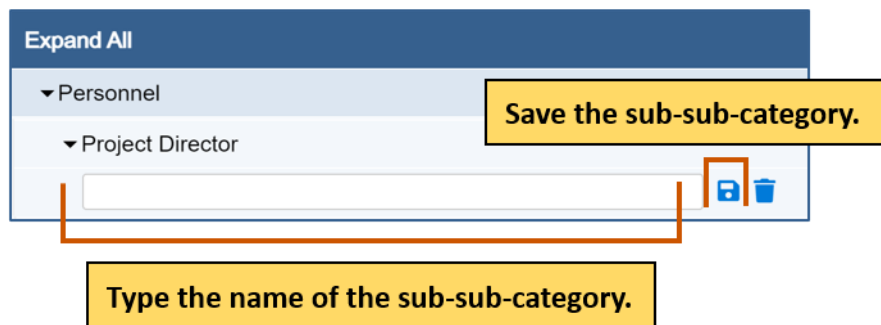


Figure 189: Save Sub-Sub-Category

Edit a Sub-Sub-Category

1. Click the blue arrow next to a budget category to expand the list.
2. Hover over a sub-category to view the budget tools.
3. Click **Edit** .

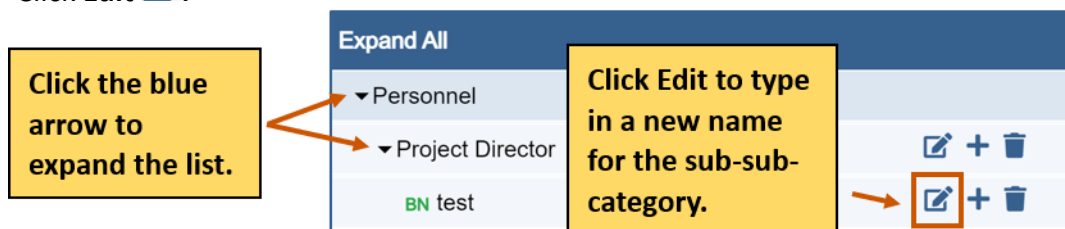


Figure 190: Edit Sub-Sub-Category

4. Type in the name of the sub-category.
5. Click **Save** .

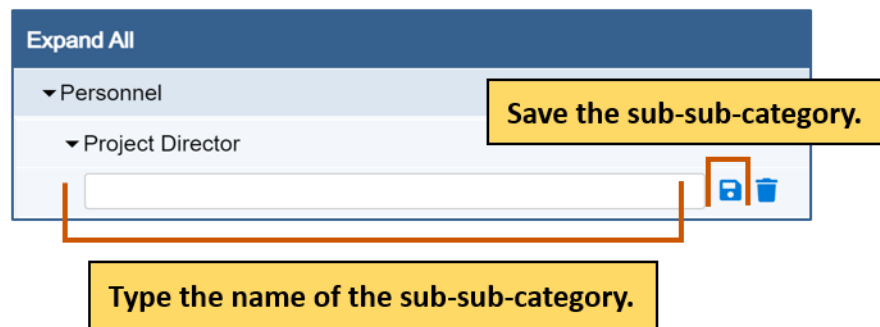


Figure 191: Save Sub-Sub-Category

Delete a Sub-Sub-Category

1. Click the blue arrow next to a budget category to expand the list.
2. Hover over a sub-sub-category to view the budget tools.
3. Click **Delete** . There is a warning asking if you are sure you want to delete the sub-sub-category.

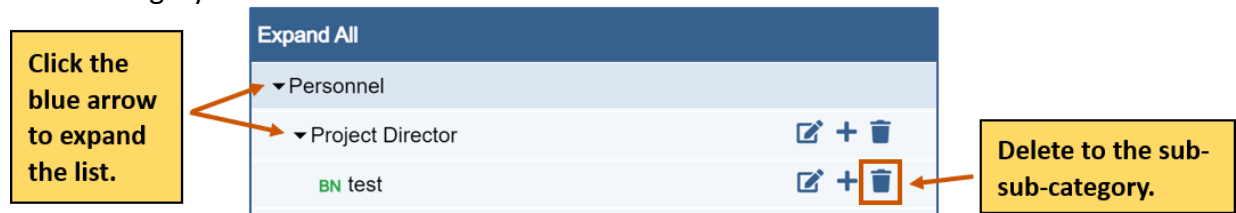


Figure 192: Delete Sub-Sub-Category

4. Click **Yes**. The sub-category is deleted.

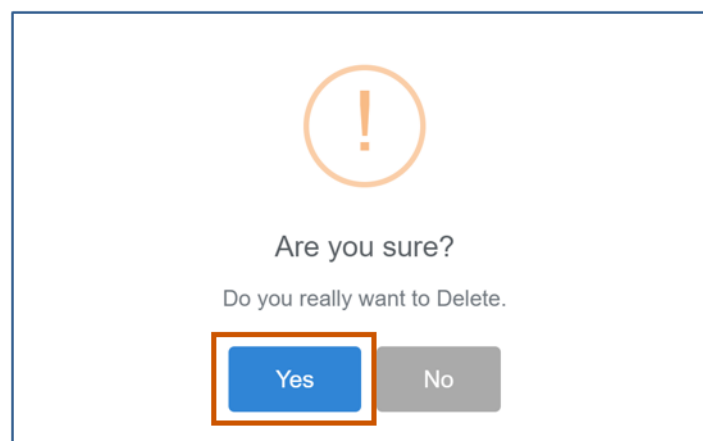


Figure 193: Warning to Delete Category

Move a Category Up or Down on the Grid

1. Hover over a category to display the budget tools.
2. Hover over **Move Up** ↑ to move the category up the grid.
Or
Click **Move Down** ↓ to move the category down the grid.

Budget Categories		Direct	Cash Match	In-Kind Match	Total	Leveraged
BN Fringe	↑ ↓ ↗ + 🗑					
BN Supplies	↑ ↓ ↗ + 🗑					
Total		\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

Figure 194: Category Commands

Budget Calculation/Narrative Tools

Note: The ability to add calculations or narratives depend on the properties selected at the time of announcement creation.

You can complete budget calculations and/or narratives for each budget category.


Add a Budget Calculation or Budget Narrative

1. **Optional:** Single-click the green Budget Justification icon next to a category to show budget calculations and/or the budget narrative. The Budget Justification dialog box appears. The calculations you see depend on the template.

The screenshot shows the 'Budget Template' tab in a software interface. At the top, there are tabs for 'Application', 'Objective Template', and 'Budget Template'. Below these are fields for 'Project Name' (set to 'Better Education for Neighbo') and 'Year' (set to 'Year 1'). There are 'Save Budget' and 'Budget Instructions' buttons. A table lists budget categories: Personnel, Fringe Benefits, Consultants/Contractors, Supplies, and Travel. Each category has a green icon with a grid pattern. A yellow callout box with an arrow points to the 'Consultants/Contractors' icon, containing the text: 'Single-click the green Budget Justification icon next to a category to show budget calculations and the budget narrative.'

Expand All	Direct	Total
Personnel		
Fringe Benefits		
Consultants/Contractors		
Supplies		
Travel		
Total	\$ 0.00	\$ 0.00

Figure 195: Add Budget Justification

2. Fill in the necessary fields.
3. Click **Save**  to save the budget calculation and/or budget narrative. The budget calculation and/or budget narrative appears in the grid below. Repeat steps 1-3 for each budget calculation or budget narrative.

Budget Calculation/Narrative Tools

Only appears if a Budget Narrative is required

Save budget calculation and/or narrative.

Budget Justification

Budget Category Name

Personnel

Budget Calculation Form

Personnel

Name

Position

Salary

\$ 100,000.00

Rate

Yearly

Time Worked(# of hours, days, months, years)

1

Percentage of Time

10%

Total Cost

\$ 10,000.00

Total Requested Amount

\$ 10,000.00

Budget Narrative

Cancel

Save

Application

Objective Template

Budget Template

Project Name*

Better Education for Neighbo

Year*

Year 1

Save Budget

Budget Instructions

Expand All	Direct	Total
Personnel	\$ 10,000.00	\$ 10,000.00
Fringe Benefits		
Consultants/Contractors		
Supplies		
Travel		
Total	\$ 10,000.00	\$ 10,000.00

Budget Justification

Budget Calculations

Budget Narrative

Personnel

Name:

Position:

Salary: \$100,000.00

Rate: Yearly

Time Worked: 1

Percentage of Time: 10%

Total Cost: \$10,000.00

Total Requested Amount: \$10,000.00

Spent 10% of time.

Figure 196: Save Budget Calculation/Narrative

Budget Calculation Template Types

Construction

Calculate how the cost to construction an item.

No Cash Match/In-Kind:

The screenshot shows a web form for budget calculation. It has two columns. The left column contains fields for 'Budget Category Name' (pre-filled with 'Construction'), 'Purpose' (pre-filled with 'Build widgets'), '# of Items' (pre-filled with '500'), and 'Total Cost' (pre-filled with '\$ 3,500.00'). The right column contains fields for 'Budget Calculation Form' (pre-filled with 'Construction'), 'Description of Work' (pre-filled with 'Help customers perform tasks on their phone easier and faster'), 'Cost' (pre-filled with '\$ 7.00'), and 'Total Requested Amount' (pre-filled with '\$ 3,500.00'). At the bottom are 'Cancel', 'Delete Entry', and 'Save' buttons. Annotations include: 1. A yellow box at the top left stating 'This field is grayed-out, which means you cannot edit it. It auto populates with the budget category name.' pointing to the 'Budget Category Name' field. 2. A yellow box at the top right stating 'This field is grayed-out, which means you cannot edit. It auto populates with the Budget Calculation Form set by the funder.' pointing to the 'Budget Calculation Form' field. 3. A yellow box at the bottom stating 'These fields auto populate once the # of Items and Cost fields are entered.' with an orange arrow pointing up to the 'Total Cost' and 'Total Requested Amount' fields.

This field is grayed-out, which means you cannot edit it. It auto populates with the budget category name.

This field is grayed-out, which means you cannot edit. It auto populates with the Budget Calculation Form set by the funder.

Budget Category Name Construction	Budget Calculation Form Construction
Purpose Build widgets	Description of Work Help customers perform tasks on their phone easier and faster
# of Items 500	Cost \$ 7.00
Total Cost \$ 3,500.00	Total Requested Amount \$ 3,500.00

Cancel Delete Entry Save

These fields auto populate once the # of Items and Cost fields are entered.

Figure 197: Construction Template – No Cash Match/In-Kind

Budget Calculation/Narrative Tools

Cash Match/In-Kind:

This field is grayed-out, which means you cannot edit it. It auto populates with the budget category name.

This field is grayed-out, which means you cannot edit. It auto populates with the Budget Calculation Form set by the funder.

This field auto populates once the # of Items and Cost fields are entered.

This field auto populates once the # of Items, Cost, Cash Match Funds, and In-Kind Match Funds fields are entered.

Buttons: Cancel, Delete Entry, Save

Figure 198: Construction Template – Cash Match/In-Kind

Total Cost = # of Items x Cost

Total Requested = # of Items x Cost – Cash Match Funds – In-Kind Match Funds

Construction Template Fields	Description
Budget Category Name	Name of budget category.
Budget Calculation Form	The name of the Budget Calculation form you are filling out.
Purpose	Type in the purpose of the construction.
Description of Work	Type in a description of the construction.
# of Items	Type in the number of items or use the arrow selector.
Cost	Type in the cost of construction. This is a dollar amount.
Total Cost	Total amount is based on the number of items and the cost.

Table 5: Construction Template Form Part 1

Budget Calculation/Narrative Tools

Construction Template Fields	Description
Total Requested Amount	The cash match funds and in-kind match funds are subtracted from the total cost.
Optional Fields	
Cash Match Funds	<p>Type in the amount of cash match funds. This is subtracted from the total requested.</p> <p>This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.</p>
In-Kind Match Funds	<p>Type in the amount of in-kind match funds. This is subtracted from the total requested.</p> <p>This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.</p>

Table 6: Construction Template Form Part 2

Budget Calculation/Narrative Tools

Consult Travel

Calculate travel expenses for each staff member.

No Cash Match/In-Kind:

The screenshot shows a web form for 'Consult Travel' with two columns of input fields. Annotations in yellow boxes explain that grayed-out fields are auto-populated and cannot be edited. An orange arrow points from a bottom annotation to the 'Total Cost' and 'Total Requested Amount' fields.

This field is grayed-out, which means you cannot edit it. It auto populates with the budget category name.		This field is grayed-out, which means you cannot edit. It auto populates with the Budget Calculation Form set by the funder.	
Budget Category Name Consult Travel		Budget Calculation Form Consultant Travel (if necessary) ▼	
Purpose of Travel Online Training		Location New Yprk	
Type of Expense Transportation ▼		Cost \$ 587.00	
Duration or Distance 2		# of Staff 3	
Total Cost \$ 3,522.00		Total Requested Amount \$ 3,522.00	
These fields auto populate once the Cost, Duration or Distance, # of Staff fields are entered.		Cancel Delete Entry Save	

Figure 199: Consult Travel Template – No Cash Match/In-Kind

Budget Calculation/Narrative Tools

Cash Match/In-Kind:

This field is grayed-out, which means you cannot edit it. It auto populates with the budget category name.

This field is grayed-out, which means you cannot edit. It auto populates with the Budget Calculation Form set by the funder.

This field auto populates once the Cost, Duration or Distance, # of Staff are entered.

This field auto populates once the Cost, Duration or Distance, # of Staff, Cash Match Funds, and In-Kind Match Funds fields are entered.

Figure 200: Consult Travel Template – Cash Match/In-Kind

Total Cost = Cost x Duration or Distance x # of Staff

Total Requested = (Cost x Duration or Distance x # of Staff) – Cash Match Funds – In-Kind Match Funds

Consult Travel Template Fields	Description
Budget Category Name	Name of budget category.
Budget Calculation Form	The name of the Budget Calculation form you are filling out.
Purpose of Travel	Type in the reason for travelling.
Location	Type the location the staff members are travelling to.
Type of Expenses	Use the drop-down list to choose a type of expense.
Cost	The money amount of the expense.
Duration or Distance	This is the distance or time it took someone to travel. This is a number.

Table 7: Consult Travel Template Form Part 1

Budget Calculation/Narrative Tools

Consult Travel Template Fields	Description
# of Staff	Type in the number of staff. This is a number.
Total Cost	Total amount is based on the cost, duration or distance, and # of staff.
Total Requested Amount	The cash match funds and in-kind match funds are subtracted from the total cost.
Optional Fields	
Cash Match Funds	<p>Type in the amount of cash match funds. This is subtracted from the total requested.</p> <p>This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.</p>
In-Kind Match Funds	<p>Type in the amount of in-kind match funds. This is subtracted from the total requested.</p> <p>This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.</p>

Table 8: Consult Travel Template Form Part 2

Budget Calculation/Narrative Tools

Equipment

Calculate the cost of equipment.

No Cash Match/In-Kind:

This field is grayed-out, which means you cannot edit it. It auto populates with the budget category name.

This field is grayed-out, which means you cannot edit. It auto populates with the Budget Calculation Form set by the funder.

Budget Category Name

Equipment

Budget Calculation Form

Equipment

Item Name	Unit Cost	# of Items	ItemTotal
<div>Widget</div>	<div>\$ 5.00</div>	<div>100</div>	<div>\$ 500.00</div>
Total Cost			<div>\$ 500.00</div>

+ Add Item

Add an item to the grid

Total Requested Amount

\$ 500.00

This field auto populates with the total of all items

Cancel

Delete Entry

Save

Figure 201: Equipment Template – No Cash Match/In-Kind

Budget Calculation/Narrative Tools

Cash Match/In-Kind:

This field is grayed-out, which means you cannot edit it. It auto populates with the budget category name.

This field is grayed-out, which means you cannot edit. It auto populates with the Budget Calculation Form set by the funder.

Budget Justification

Budget Category Name: Equipment

Budget Calculation Form: Equipment

Item Name	Unit Cost	# of Items	Item Total
Widget	\$ 5.00	100	\$ 500.00
Total Cost			\$ 500.00

+ Add Item

Cash Match Funds: \$ 100.00

In-Kind Match Funds: \$ 150.00

Total Requested Amount: \$ 250.00

This field auto populates once the Unit Cost, # of Items, Cash Match Funds, and In-Kind Match Funds fields are entered.

This field auto populates with the total of all items

Buttons: Cancel, Delete Entry, Save

Figure 202: Equipment Template – Cash Match/In-Kind

Item Total = Unit Cost x # of Items

Total Cost = Unit Cost x # of Items x number of items you input

Total Requested = (Unit Cost x # of Items x number of items inputted) – Cash Match Funds – In-Kind Match Funds

Budget Calculation/Narrative Tools

Add an Item

1. Click **+ Add Item**. The Item grid is now editable.

The screenshot shows the 'Budget Justification' form. At the top, there are two dropdown menus: 'Budget Category Name' (set to 'Equipment') and 'Budget Calculation Form' (set to 'Equipment'). Below these is a table with four columns: 'Item Name', 'Unit Cost', '# of Items', and 'Item Total'. The 'Total Cost' is displayed as '\$ 0.00'. A yellow callout box with a red border points to the '+ Add Item' button, with the text 'Add an item to the grid'. Below the table, there are input fields for 'Cash Match Funds' (\$ 0.00) and 'In-Kind Match Funds' (\$ 0.00). At the bottom, there is a 'Total Requested Amount' field (\$ 0.00) and three buttons: 'Cancel', 'Delete Entry', and 'Save'.

Figure 203: Equipment – Add Item

2. Enter the data. Repeat steps 1 and 2 for each item you wish to add.
3. Click **Save**. The budget calculations appear in the grid.

The screenshot shows the 'Budget Justification' form after data entry. The 'Item Name' field now contains 'Widget', 'Unit Cost' is '\$ 5.00', and '# of Items' is '100'. The 'Item Total' is '\$ 500.00'. The 'Total Cost' is now '\$ 500.00'. A yellow callout box with a red border points to the 'Total Requested Amount' field, which now shows '\$ 250.00', with the text 'This field auto populates once the item fields are entered.' Another yellow callout box with a red border points to the 'Save' button, with the text 'Save the calculation/narrative'. The 'Cash Match Funds' field is now '\$ 100.00' and the 'In-Kind Match Funds' field is '\$ 150.00'. The 'Save' button is highlighted with a red box.

Figure 204: Save Equipment Calculation/Narrative

Budget Calculation/Narrative Tools

Equipment Template Fields	Description
Budget Category Name	Name of budget category.
Budget Calculation Form	The name of the Budget Calculation form you are filling out.
Item Name	The name of the Budget Calculation form you are filling out.
Unit Cost	Cost of the unit.
# of items	Type in the number of items.
Item Total	Total amount of all the items.
Total Cost	Total amount of all the items. Total cost is based on the unit cost, # of items, and the number of items you input.
Add Item	Add an item to the grid.
Total Requested Amount	Total requested amount is based on the unit cost, number of items, and the number of items you inputted. The cash match funds, and in-kind match funds are subtracted from the total cost.
Optional Fields	
Cash Match Funds	<p>Type in the amount of cash match funds. This is subtracted from the total requested.</p> <p>This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.</p>
In-Kind Match Funds	<p>Type in the amount of in-kind match funds. This is subtracted from the total requested.</p> <p>This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.</p>

Table 9: Equipment Template Form

Budget Calculation/Narrative Tools

Equipment (Pro Rated)

Calculate the cost of equipment based on how long it is used.

No Cash Match/In-Kind:

The screenshot shows a web form for budget calculation. At the top, there are two dropdown menus: 'Budget Category Name' and 'Budget Calculation Form', both set to 'Equipment (pro rated)'. Below these is a table with five columns: 'Item Name', 'Unit Cost', '# of Items', 'Item Sub Total', and 'Pro Rated Item Total'. The table contains one row for 'Widget' with a unit cost of \$ 5.00 and 100 items, resulting in a sub-total of \$ 500.00 and a pro-rated total of \$ 150.00. Below the table is a 'Total Cost' section with two fields: '\$ 500.00' and '\$ 150.00'. To the left of the table is a '+ Add Item' button. Below the table is a 'Total Requested Amount' field showing '\$ 150.00'. At the bottom right are 'Cancel', 'Delete Entry', and 'Save' buttons. Annotations in yellow boxes explain that the dropdowns are grayed-out and auto-populated. An arrow points from the 'Total Requested Amount' field to the 'Pro Rated Item Total' column header, indicating it auto-populates with the total of all items.

This field is grayed-out, which means you cannot edit it. It auto populates with the budget category name.

This field is grayed-out, which means you cannot edit. It auto populates with the Budget Calculation Form set by the funder.

Item Name	Unit Cost	# of Items	Item Sub Total	Pro Rated Item Total
Widget	\$ 5.00	100	\$ 500.00	\$ 150.00
Total Cost			\$ 500.00	\$ 150.00

+ Add Item **Add an item to the grid**

Total Requested Amount
\$ 150.00

These fields auto populate with the total of all items

Cancel Delete Entry Save

Figure 205: Equipment(Pro-Rated) Template – No Cash Match/In-Kind

Budget Calculation/Narrative Tools

Cash Match/In-Kind:

This field is grayed-out, which means you cannot edit it. It auto populates with the budget category name.

This field is grayed-out, which means you cannot edit. It auto populates with the Budget Calculation Form set by the funder.

This field auto populates with the total of all items

Add an item to the grid

This field auto populates once the total number of items are inputted and the Unit Cost, # of Items, Cash Match Funds, and In-Kind Match Funds fields are entered.

Budget Category Name		Budget Calculation Form		
Equipment (pro rated)		Equipment (pro rated)		
Item Name	Unit Cost	# of Items	Item Sub Total	Pro Rated Item Total
Widget	\$ 5.00	100	\$ 500.00	\$ 150.00
Total Cost			\$ 500.00	\$ 150.00
<div>+ Add Item</div>				
Cash Match Funds		In-Kind Match Funds		
\$ 50.00		\$ 50.00		
Total Requested Amount				
\$ 50.00				
		<div>Cancel</div> <div>Delete Entry</div> <div>Save</div>		

Figure 206: Equipment(Pro-Rated) Template – Cash Match/In-Kind

Total Cost (Item Sub Total) = Unit Cost x # of Items x the number of items inputted

Total Cost (Pro Rated Item Total) = Total of all the line items

Total Requested Amount = (Pro Rated Item Total x the total of all the line items) – Cash Match Funds – In-Kind Match Funds

Budget Calculation/Narrative Tools

Add an Item

1. Click **+ Add Item**. The Item grid is now editable.

Budget Justification

Budget Category Name: Equipment (pro rated) Budget Calculation Form: Equipment (pro rated)

Item Name	Unit Cost	# of Items	Item Sub Total	Pro Rated Item Total
Total Cost			\$ 0.00	\$ 0.00

+ Add Item

Cash Match Funds: \$ 0.00 In-Kind Match Funds: \$ 0.00

Total Requested Amount: \$ 0.00

Cancel Delete Entry Save

Add an item to the grid

Figure 207: Equipment (Pro Rated) – Add Item

2. Enter the data. Repeat steps 1 and 2 for each item you wish to add.
3. Click **Save**. The budget calculations appear in the grid.

Budget Justification

Budget Category Name: Equipment (pro rated) Budget Calculation Form: Equipment (pro rated)

Item Name	Unit Cost	# of Items	Item Sub Total	Pro Rated Item Total
Widget	\$ 5.00	100	\$ 500.00	\$ 150.00
Total Cost			\$ 500.00	\$ 150.00

+ Add Item

Cash Match Funds: \$ 50.00 In-Kind Match Funds: \$ 50.00

Total Requested Amount: \$ 50.00

Cancel Delete Entry Save

Save the calculation/narrative

This field auto populates once the item fields are entered.

Figure 208: Save Equipment (Pro Rated) Calculation/Narrative

Budget Calculation/Narrative Tools

Equipment (Pro Rated) Template Fields	Description
Budget Category Name	Name of budget category.
Budget Calculation Form	The name of the Budget Calculation form you are filling out.
Item Name	The name of the Budget Calculation form you are filling out.
Unit Cost	Cost of the unit.
# of items	Type in the number of items.
Item Sub Total	Total amount of all the items.
Pro Rated Item Total	Total amount of the item was prorated for.
Add Item	Add an item to the grid.
Total Cost	Total amount of all the items. The Total Cost comes from a total sum of the "Pro Rated Item Total" column.
Total Requested Amount	The cash match funds and in-kind match funds are subtracted from the total cost.
Optional Fields	
Cash Match Funds	<p>Type in the amount of cash match funds. This is subtracted from the total requested.</p> <p>This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.</p>
In-Kind Match Funds	<p>Type in the amount of in-kind match funds. This is subtracted from the total requested.</p> <p>This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.</p>

Table 10: Equipment (Pro Rated) Template Form

Budget Calculation/Narrative Tools

Fringe Benefits

Calculate the amount used for extra benefits for employees.

No Cash Match/In-Kind:

The screenshot shows a web form titled "Fringe Benefits" with several input fields. Annotations in yellow boxes explain the status of certain fields:

- Top Left Annotation:** "This field is grayed-out, which means you cannot edit it. It auto populates with the budget category name." It points to the "Budget Category Name" field, which contains "Fringe Benefits".
- Top Right Annotation:** "This field is grayed-out, which means you cannot edit. It auto populates with the Budget Calculation Form set by the funder." It points to the "Budget Calculation Form" dropdown menu, which also shows "Fringe Benefits".
- Bottom Annotation:** "These fields auto populate once the Base and Rate fields are entered." It points to the "Total Requested Amount" field (showing "\$ 7,500.00") and the "Total Cost" field (showing "\$ 7,500.00").

Other visible fields include:

- Name:** "Sunshine Industries"
- Rate:** "10%"
- Base:** "\$ 75,000.00"

At the bottom right, there are three buttons: "Cancel", "Delete Entry", and "Save".

Figure 209: Fringe Benefits Template – No Cash Match/In-Kind

Budget Calculation/Narrative Tools

Cash Match/In-Kind:

This field is grayed-out, which means you cannot edit it. It auto populates with the budget category name.

This field is grayed-out, which means you cannot edit. It auto populates with the Budget Calculation Form set by the funder.

This field auto populates once the base and rate fields are entered.

This field auto populates once the Base, Rate, Cash Match Funds, and In-Kind Match Funds fields are entered.

Budget Category Name: Fringe Benefits

Budget Calculation Form: Fringe Benefits

Name: Sunshine Industries

Base: \$ 75,000.00

Rate: 10%

Total Cost: \$ 7,500.00

Cash Match Funds: \$ 1,000.00

In-Kind Match Funds: \$ 2,000.00

Total Requested Amount: \$ 4,500.00

Buttons: Cancel, Delete Entry, Save

Figure 210: Fringe Benefits Template – Cash Match/In-Kind

Total Cost = Base x Rate

Total Requested = (Base x Rate) – Cash Match Funds – In-Kind Funds

Fringe Benefits Template Fields	Description
Budget Category Name	Name of budget category.
Budget Calculation Form	The name of the Budget Calculation form you are filling out.
Name	Name of employee or position.
Base	Initial salary amount of employee. This is a dollar amount.
Rate	The rate the employee spent on the project. This is a percentage.
Total Cost	Total amount based on the rate percentage and the base salary.
Total Requested Amount	The cash match funds and in-kind match funds are subtracted from the total cost.

Table 11: Fringe Benefits Template Form Part 1

Budget Calculation/Narrative Tools

Fringe Benefits Template Fields	Description
Optional Fields	
Cash Match Funds	<p>Type in the amount of cash match funds. This is subtracted from the total requested.</p> <p>This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.</p>
In-Kind Match Funds	<p>Type in the amount of in-kind match funds. This is subtracted from the total requested.</p> <p>This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.</p>

Table 12: Fringe Benefits Template Form Part 2

Budget Calculation/Narrative Tools

Indirect Costs

Calculate costs that are not directly related to the grant.

No Cash Match/In-Kind:

The screenshot shows a web form titled "Indirect Costs Template – No Cash Match/In-Kind". The form is divided into two main columns. The left column contains fields for "Budget Category Name" (set to "Indirect Costs"), "Description" (set to "Insurance"), and "Indirect Cost Rate" (set to "6"). The right column contains fields for "Budget Calculation Form" (set to "Indirect Costs"), "Base" (set to "\$ 1,050.00"), and "Total Cost" (set to "\$ 6,300.00"). Below these columns is a "Total Requested Amount" field, also set to "\$ 6,300.00". At the bottom right are buttons for "Cancel", "Delete Entry", and "Save".

Annotations:

- Top Left:** "This field is grayed-out, which means you cannot edit it. It auto populates with the budget category name." (points to Budget Category Name)
- Top Right:** "This field is grayed-out, which means you cannot edit. It auto populates with the Budget Calculation Form set by the funder." (points to Budget Calculation Form)
- Bottom:** "These fields auto populate once the Base and Indirect Cost Rate are entered." (points to Total Requested Amount and Total Cost)

Figure 211: Indirect Costs Template – No Cash Match/In-Kind

Budget Calculation/Narrative Tools

Cash Match/In-Kind:

This field is grayed-out, which means you cannot edit it. It auto populates with the budget category name.

This field is grayed-out, which means you cannot edit. It auto populates with the Budget Calculation Form set by the funder.

This field auto populates once the Base and Indirect Cost Rate fields are entered.

This field auto populates once the Base, Indirect Cost Rate, Cash Match Funds, and In-Kind Match Funds fields are entered.

Figure 212: Indirect Costs Template – Cash Match/In-Kind

Total Cost = Base x Indirect Cost Rate

Total Requested Amount = (Base x Indirect Cost Rate) – Cash Match Funds – In-Kind Match Funds

Indirect Cost Template Fields	Description
Budget Category Name	Name of budget category.
Budget Calculation Form	The name of the Budget Calculation form you are filling out.
Description	Type in the description of the indirect cost.
Base	The initial amount of the indirect cost.
Indirect Cost Rate	Salary amount of employee. This is a number value.
Total Cost	Total cost is based on the base salary and indirect cost rate.
Total Requested Amount	The cash match funds and in-kind match funds are subtracted from the total cost.

Table 13: Indirect Costs Template Form Part 1

Budget Calculation/Narrative Tools

Indirect Cost Template Fields	Description
Optional Fields	
Cash Match Funds	Type in the amount of cash match funds. This is subtracted from the total requested. This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.
In-Kind Match Funds	Type in the amount of in-kind match funds. This is subtracted from the total requested. This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.

Table 14: Indirect Costs Template Form Part 1

Budget Calculation/Narrative Tools

Personnel

Calculate how much time was spent working on a budget category based on a person's salary. If cash-match, in-kind, and leveraged are shown, the Cash-Match and In-Kind Match fields appear.

No Cash Match/In-Kind:

The screenshot shows a web form for personnel budget calculation. It is divided into two main columns. The left column contains fields for 'Budget Category Name' (Personnel), 'Name' (John Smith), 'Salary' (\$100,000.00), and 'Time Worked' (1). The right column contains 'Budget Calculation Form' (Personnel), 'Position' (empty), 'Rate' (Yearly), and 'Percentage of Time' (10%). At the bottom, there are two summary fields: 'Total Cost' (\$10,000.00) and 'Total Requested Amount' (\$7,000.00). Below these are 'Cancel', 'Delete Entry', and 'Save' buttons. Three yellow callout boxes provide additional information: the first points to the 'Budget Category Name' field, the second points to the 'Budget Calculation Form' dropdown, and the third points to the 'Total Cost' and 'Total Requested Amount' fields.

This field is grayed-out, which means you cannot edit it. It auto populates with the budget category name.

This field is grayed-out, which means you cannot edit. It auto populates with the Budget Calculation Form set by the funder.

These fields auto populate once the Salary, Time Worked (# of hours, days, months, and year), and Percentage of Time fields are entered.

Budget Category Name Personnel	Budget Calculation Form Personnel
Name John Smith	Position
Salary \$ 100,000.00	Rate Yearly
Time Worked(# of hours, days, months, years) 1	Percentage of Time 10%
Total Cost \$ 10,000.00	Total Requested Amount \$ 7,000.00

Cancel Delete Entry Save

Figure 213: Personnel Template – No Cash Match/In-Kind

Budget Calculation/Narrative Tools

Cash Match/In-Kind:

This field is grayed-out, which means you cannot edit it. It auto populates with the budget category name.

This field is grayed-out, which means you cannot edit. It auto populates with the Budget Calculation Form set by the funder.

This field auto populates once the Salary, Time Worked (# of hours, days, months, and year), Percentage of Time, Cash Match Funds, and In-Kind Funds fields are entered.

Budget Category Name
Personnel

Budget Calculation Form
Personnel

Name
John Smith

Position
Grants Manager

Salary
\$ 100,000.00

Rate
Yearly

Time Worked(# of hours, days, months, years)
1

Percentage of Time
10%

Total Cost
\$ 10,000.00

Cash Match Funds
\$ 2,000.00

In-Kind Match Funds
\$ 1,000.00

Total Requested Amount
\$ 7,000.00

Cancel Delete Entry Save

Figure 214: Personnel Template – Cash Match/In-Kind

Total Cost = Salary x Time Worked x Percentage of Time

Total Requested = (Salary x Time Worked x Percentage of Time) – Cash Match Funds – In-Kind Funds

Personnel Template Fields	Description
Budget Category Name	Name of budget category.
Budget Calculation Form	The name of the Budget Calculation form you are filling out.
Name	Name of employee.
Position	Position of employee.
Salary	Salary amount of employee. This is a dollar amount.

Table 15: Personnel Template Form Part 1

Budget Calculation/Narrative Tools

Personnel Template Fields	Description
Rate	<p>The rate the employee spent on the project.</p> <p>Rates include:</p> <ul style="list-style-type: none"> • Hourly • Daily • Weekly • Yearly
Time Worked (# of hours, days, months, years)	The time worked on the category. Give the time in # of hours, days, months, or years.
Percentage of Time	Percentage of time the employee will work on the project. For example, 100% of their time over 1 year. This is a percentage value.
Total Cost	Total amount based on the salary, time worked, and percentage of time.
Total Requested Amount	Total requested amount based on the salary, time worked, and percentage of time (and cash match and in-kind match if necessary).
Optional Fields	
Cash Match Funds	<p>Type in the amount of cash match funds. This is subtracted from the total requested.</p> <p>This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.</p>
In-Kind Match Funds	<p>Type in the amount of in-kind match funds. This is subtracted from the total requested.</p> <p>This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.</p>

Table 16: Personnel Template Form Part 2

Budget Calculation/Narrative Tools

Procurement Contracts

Calculate the costs of goods or services purchased from a seller.

No Cash Match/In-Kind:

The screenshot shows a web form for 'Procurement Contracts'. It has two columns. The left column contains: 'Budget Category Name' (dropdown, 'Procurement Contracts'), 'Description' (text, 'Rent a building'), 'Consultant?' (dropdown, 'No'), and 'Total Requested Amount' (text, '\$ 15,000.00'). The right column contains: 'Budget Calculation Form' (dropdown, 'Procurement Contracts'), 'Purpose' (text, 'To house equipment'), and 'Total Cost' (text, '\$ 15,000.00'). At the bottom are 'Cancel', 'Delete Entry', and 'Save' buttons. Annotations in yellow boxes with orange borders point to specific fields: the top-left box points to 'Budget Category Name'; the top-right box points to 'Budget Calculation Form'; the bottom box points to 'Total Requested Amount' with an orange arrow.

This field is grayed-out, which means you cannot edit it. It auto populates with the budget category name.

This field is grayed-out, which means you cannot edit. It auto populates with the Budget Calculation Form set by the funder.

This field auto populates once the Total Cost field is entered.

Figure 215: Procurement Contracts Template – No Cash Match/In-Kind

Budget Calculation/Narrative Tools

Cash Match/In-Kind:

This field is grayed-out, which means you cannot edit it. It auto populates with the budget category name.

This field is grayed-out, which means you cannot edit. It auto populates with the Budget Calculation Form set by the funder.

This field auto populates once the Total Cost, Cash Match Funds, and In-Kind Match Funds fields are entered.

Figure 216: Procurement Contracts Template – Cash Match/In-Kind

Total Requested Amount = Total Cost – Cash Match Funds – In-Kind Match Funds

Procurement Contracts Template Fields	Description
Budget Category Name	Name of budget category.
Budget Calculation Form	The name of the Budget Calculation form you are filling out.
Description	Type in the description of the contract.
Purpose	Type in the purpose of the contract.
Consultant	Use the drop-down to choose whether there is a consultant.
Total Cost	Type in the total cost of the contract.
Total Requested Amount	The cash match funds and in-kind match funds are subtracted from the total cost.

Table 17: Procurement Contracts Template Form Part 1

Budget Calculation/Narrative Tools

Procurement Contracts Template Fields	Description
Optional Fields	
Cash Match Funds	<p>Type in the amount of cash match funds. This is subtracted from the total requested.</p> <p>This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.</p>
In-Kind Match Funds	<p>Type in the amount of in-kind match funds. This is subtracted from the total requested.</p> <p>This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.</p>

Table 18: Procurement Contracts Template Form Part 2

Budget Calculation/Narrative Tools

Salary By Position

Calculate the salary of employees by position.

No Cash Match/In-Kind:

This field is grayed-out, which means you cannot edit it. It auto populates with the budget category name.

This field is grayed-out, which means you cannot edit. It auto populates with the Budget Calculation Form set by the funder.

Budget Category Name: Salary by Position

Budget Calculation Form: Salary by Position

No. of Positions *: 5

Total FTE *: 40

Salary Cost: \$ 100,000.00

Total Requested Amount: \$ 100,000.00

This field auto populates once the Salary Cost field is entered.

Buttons: Cancel, Delete Entry, Save

Figure 217: Salary by Position Template – No Cash Match/In-Kind

Cash Match/In-Kind:

This field is grayed-out, which means you cannot edit it. It auto populates with the budget category name.

This field is grayed-out, which means you cannot edit. It auto populates with the Budget Calculation Form set by the funder.

Budget Category Name: Salary by Position

Budget Calculation Form: Salary by Position

No. of Positions *: 5

Total FTE *: 40

Salary Cost: \$ 100,000.00

Cash Match Funds: \$ 5,000.00

In-Kind Match Funds: \$ 7,000.00

Total Requested Amount: \$ 88,000.00

This field auto populates once the Salary Cost, Cash Match Funds, and In-Kind Match Funds fields are entered.

Buttons: Cancel, Delete Entry, Save

Figure 218: Salary by Position Template – Cash Match/In-Kind

Budget Calculation/Narrative Tools

Total Requested Amount = Salary Cost – Cash Match Funds – In-Kind Match Funds

Salary by Position Template Fields	Description
Budget Category Name	Name of budget category.
Budget Calculation Form	The name of the Budget Calculation form you are filling out.
No. of Positions	Type in the number of employees working in the position or use the arrow selector.
Total FTE	Type in the total FTE or use the arrow selector.
Salary Cost	Total salaries of all employee in the position. This is a dollar amount.
Total Requested Amount	The cash match funds and in-kind match funds are subtracted from the total cost.
Optional Fields	
Cash Match Funds	<p>Type in the amount of cash match funds. This is subtracted from the total requested.</p> <p>This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.</p>
In-Kind Match Funds	<p>Type in the amount of in-kind match funds. This is subtracted from the total requested.</p> <p>This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.</p>

Table 19: Salary by Position Template Form

Budget Calculation/Narrative Tools

Subaward (subgrants)

Calculate the cost of the subaward (subgrant).

No Cash Match/In-Kind:

The screenshot shows a web form for creating a subaward. It has two columns. The left column contains fields for 'Budget Category Name' (populated with 'Subaward (subgrants)'), 'Description' (populated with 'Service Delivery'), 'Consultant?' (a dropdown menu with 'No' selected), and 'Total Requested Amount' (populated with '\$ 150,000.00'). The right column contains fields for 'Budget Calculation Form' (a dropdown menu with 'Subawards (Subgrants)' selected), 'Purpose' (populated with 'Work together to educate the community about the services'), and 'Total Cost' (populated with '\$ 150,000.00'). At the bottom right are three buttons: 'Cancel', 'Delete Entry', and 'Save'. Three yellow callout boxes with black text provide instructions: the first points to the 'Budget Category Name' field, the second points to the 'Budget Calculation Form' dropdown, and the third points to the 'Total Requested Amount' field with an arrow indicating it is populated from the 'Total Cost' field.

This field is grayed-out, which means you cannot edit it. It auto populates with the budget category name.

This field is grayed-out, which means you cannot edit. It auto populates with the Budget Calculation Form set by the funder.

This field auto populates once the Total field is entered.

Budget Category Name
Subaward (subgrants)

Budget Calculation Form
Subawards (Subgrants)

Description
Service Delivery

Purpose
Work together to educate the community about the services

Consultant?
No

Total Cost
\$ 150,000.00

Total Requested Amount
\$ 150,000.00

Cancel Delete Entry Save

Figure 219: Subaward (Subgrant) Template – No Cash Match/In-Kind

Budget Calculation/Narrative Tools

Cash Match/In-Kind:

This field is grayed-out, which means you cannot edit it. It auto populates with the budget category name.

This field is grayed-out, which means you cannot edit. It auto populates with the Budget Calculation Form set by the funder.

This field auto populates once the Total, Cash Match Funds, and In-Kind Match Funds fields are entered.

Budget Category Name
Subaward (subgrants)

Budget Calculation Form
Subawards (Subgrants) ▾

Description
Service Delivery

Purpose
Work together to educate the community about the services

Consultant?
No ▾

Total Cost
\$ 150,000.00

Cash Match Funds
\$ 10,000.00

In-Kind Match Funds
\$ 5,000.00

Total Requested Amount
\$ 135,000.00

Cancel Delete Entry Save

Figure 220: Subaward (Subgrant) Template – Cash Match/In-Kind

Total Requested = Total Cost – Cash Match Funds – In-Kind Match Funds

Subaward (Subgrant) Template Fields	Description
Budget Category Name	Name of budget category.
Budget Calculation Form	The name of the Budget Calculation form you are filling out.
Description	Type in the description of the subaward (subgrant).
Purpose	Type in the purpose of the subaward (subgrant).
Consultant	Use the drop-down to choose whether there is a consultant.
Total Cost	Total amount based on the total cost.

Table 20: Subaward (Subgrant) Template Form Part 1

Budget Calculation/Narrative Tools

Subaward (Subgrant) Template Fields	Description
Total Requested Amount	The cash match funds and in-kind match funds are subtracted from the total cost.
Optional Fields	
Cash Match Funds	<p>Type in the amount of cash match funds. This is subtracted from the total requested.</p> <p>This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.</p>
In-Kind Match Funds	<p>Type in the amount of in-kind match funds. This is subtracted from the total requested.</p> <p>This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.</p>

Table 21: Subaward (Subgrant) Template Form Part 2

Budget Calculation/Narrative Tools

Supplies

Calculate the cost of supplies.

No Cash Match/In-Kind:

The screenshot shows the 'Supplies' form interface. At the top, there are two dropdown menus: 'Budget Category Name' and 'Budget Calculation Form', both containing the value 'Supplies'. Below these is a table with four columns: 'Item Name', 'Unit Cost', '# of Items', and 'Item Total'. The first row contains 'Widget', '\$ 5.00', '100', and '\$ 500.00'. Below the table, there is a 'Total Cost' field showing '\$ 500.00' and a '+ Add Item' button. At the bottom, there is a 'Total Requested Amount' field showing '\$ 500.00'. The form also includes 'Cancel', 'Delete Entry', and 'Save' buttons at the bottom right.

Annotations:

- Budget Category Name:** This field is grayed-out, which means you cannot edit it. It auto populates with the budget category name.
- Budget Calculation Form:** This field is grayed-out, which means you cannot edit. It auto populates with the Budget Calculation Form set by the funder.
- + Add Item:** Add an item to the grid
- Item Total (for Widget):** This field auto populates once you input all the items and the Unit Cost, # of Items Funds fields are entered.
- Total Requested Amount:** This field auto populates based on all of the item totals.

Figure 221: Supplies Template – No Cash Match/In-Kind

Budget Calculation/Narrative Tools

Cash Match/In-Kind:

This field is grayed-out, which means you cannot edit it. It auto populates with the budget category name.

This field is grayed-out, which means you cannot edit. It auto populates with the Budget Calculation Form set by the funder.

Budget Category Name: Supplies

Budget Calculation Form: Supplies

Item Name	Unit Cost	# of Items	ItemTotal
Widget	\$ 5.00	100	\$ 500.00
Total Cost			\$ 500.00

+ Add Item

Add an item to the grid

This field auto populates once you input all the items and the Unit Cost, # of Items Funds fields are entered.

Cash Match Funds: \$ 100.00

In-Kind Match Funds: \$ 200.00

Total Requested Amount: \$ 200.00

This field auto populates based on all of the item totals. The Cash Match Funds and In-Kind Match Funds are subtracted.

Buttons: Cancel, Delete Entry, Save

Figure 222: Supplies Template – Cash Match/In-Kind

Item Total = Unit Cost x # of Items x number of items inputted

Total Requested = (Unit Cost x # of Items x number of items inputted) – Cash Match Funds – In-Kind Match Funds

Budget Calculation/Narrative Tools

Add an Item

1. Click **+ Add Item**. The Item grid is now editable.

Budget Justification

Budget Category Name: Supplies

Budget Calculation Form: Supplies

Item Name	Unit Cost	# of Items	Item Total
Total Cost			\$ 0.00

+ Add Item Add an item to the grid

Total Requested Amount: \$ 0.00

Cancel Delete Entry Save

Figure 223: Add Item

2. Enter the data. Repeat steps 1 and 2 for each item you wish to add.
3. Click **Save**. The budget calculations appear in the grid.

Budget Justification

Budget Category Name: Supplies

Budget Calculation Form: Supplies

Item Name	Unit Cost	# of Items	Item Total
Widget	\$ 5.00	500	\$ 2,500.00
Total Cost			\$ 2,500.00

+ Add Item

Total Requested Amount: \$ 2,500.00

This field auto populates once the item fields are entered.

Save the calculation/narrative

Cancel Delete Entry Save

Figure 224: Save Supplies Calculation/Narrative

Budget Calculation/Narrative Tools

Supplies Fields	Description
Budget Category Name	Name of budget category.
Budget Calculation Form	The name of the Budget Calculation form you are filling out.
Item Name	The name of the Budget Calculation form you are filling out.
Unit Cost	Cost of the unit.
# of items	Type in the number of items.
Item Total	Total amount of a specific item.
Total Cost	Total amount of all the items.
Add Item	Add an item to the grid.
Total Requested Amount	Total requested amount is based on the unit cost, number of Items, and the number of items you inputted. The cash match funds and in-kind match funds are subtracted from the total cost.
Optional Fields	
Cash Match Funds	<p>Type in the amount of cash match funds. This is subtracted from the total requested.</p> <p>This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.</p>
In-Kind Match Funds	<p>Type in the amount of in-kind match funds. This is subtracted from the total requested.</p> <p>This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.</p>

Table 22: Supplies Template Form

Budget Calculation/Narrative Tools

Travel

Calculate travel expenses for each staff member.

No Cash Match/In-Kind:

This field is grayed-out, which means you cannot edit it. It auto populates with the budget category name.

This field is grayed-out, which means you cannot edit. It auto populates with the Budget Calculation Form set by the funder.

These fields auto populate once the Basis, Basis Cost, basis quantity, # of Staff, and # of Trips fields are entered.

Budget Category Name	Budget Calculation Form
Travel	Travel
Purpose of Travel	Location
Drive to destination	New York
Type of Expense	Basis
Transportation	Mileage
Basis Cost	Basis Quantity
\$ 1.50	100
# of Staff	# of Trips
3	1
Total Cost	Total Requested Amount
\$ 450.00	\$ 450.00

Cancel Delete Entry Save

Figure 225: Travel Template – No Cash Match/In-Kind

Budget Calculation/Narrative Tools

Cash Match/In-Kind:

This field is grayed-out, which means you cannot edit it. It auto populates with the budget category name.

This field is grayed-out, which means you cannot edit. It auto populates with the Budget Calculation Form set by the funder.

This field auto populates once the Basis, Basis Cost, basis quantity, # of Staff, and # of Trips fields are entered.

This field auto populates once the Basis, Basis Cost, basis quantity, # of Staff, # of Trips, Cash Match Funds, and In-Kind Match Funds fields are entered.

The form contains the following fields and values:

- Budget Category Name: Travel
- Budget Calculation Form: Travel
- Purpose of Travel: Drive to destination
- Location: New York
- Type of Expense: Transportation
- Basis: Mileage
- Basis Cost: \$ 1.50
- Basis Quantity: 100
- # of Staff: 3
- # of Trips: 1
- Total Cost: \$ 450.00
- Cash Match Funds: \$ 100.00
- In-Kind Match Funds: \$ 50.00
- Total Requested Amount: \$ 300.00

Buttons: Cancel, Delete Entry, Save

Figure 226: Travel Template – Cash Match/In-Kind

Total Cost = (Basis Cost x Basis Quantity x # of Staff x # of Trips)

Total Requested = (Basis Cost x Basis Quantity x # of Staff x # of Trips) – Cash Match Funds – In-Kind Match Funds

Travel Fields	Description
Budget Category Name	Name of budget category.
Budget Calculation Form	The name of the Budget Calculation form you are filling out.
Purpose of Travel	Type in the reason for travel.
Location	Type the location.
Type of Expense	Type in the type of expense. This is an alphanumeric field.
Basis	Alphanumeric field to explain what the expense is. For example, it can be mileage, such as how much per mile.

Table 23: Travel Template Form Part 1

Budget Calculation/Narrative Tools

Personnel Template Fields	Description
Basis Cost	Cost of the basis. This is a dollar amount. For example, a \$1.50 per mile.
Basis Quantity	Type in the number of basis items. This is a numeri value. For example, 100 miles.
# of Staff	Type the number of people who are travelling.
# of Trips	Type in the number of trips the staff will take.
Total Cost	Total amount based on the salary and percentage of time. This is a dollar amount.
Total Requested Amount	Total requested amount based on the salary and percentage of time. This is a dollar amount.
Optional Fields	
Cash Match Funds	Type in the amount of cash match funds. This is subtracted from the total requested. This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.
In-Kind Match Funds	Type in the amount of in-kind match funds. This is subtracted from the total requested. This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.

Table 24: Travel Template Form Part 2

Budget Calculation/Narrative Tools

Travel 2

Displays the number of people and cost per trip.

No Cash Match/In-Kind:

This field is grayed-out, which means you cannot edit it. It auto populates with the budget category name.

This field is grayed-out, which means you cannot edit. It auto populates with the Budget Calculation Form set by the funder.

Budget Category Name: Travel 2

Budget Calculation Form: Travel 2

No. of People *: 3

Direct: \$ 1,500.00

Total Requested Amount: \$ 1,500.00

This field auto populates once the Direct field is entered.

Buttons: Cancel, Delete Entry, Save

Figure 227: Travel 2 Template – No Cash Match/In-Kind

No Cash Match/In-Kind:

This field is grayed-out, which means you cannot edit it. It auto populates with the budget category name.

This field is grayed-out, which means you cannot edit. It auto populates with the Budget Calculation Form set by the funder.

Budget Category Name: Travel 2

Budget Calculation Form: Travel 2

No. of People *: 3

Direct: \$ 1,500.00

Cash Match Funds: \$ 200.00

In-Kind Match Funds: \$ 150.00

Total Requested Amount: \$ 1,150.00

This field auto populates once the Direct, Cash Match Funds, and In-kind Match Funds fields are entered.

Buttons: Cancel, Delete Entry, Save

Figure 228: Travel 2 Template – Cash Match/In-Kind

Budget Calculation/Narrative Tools

Total Requested Amount = Direct – Cash Match Funds – In-Kind Match Funds

Travel Fields	Description
Budget Category Name	Name of budget category.
Budget Calculation Form	The name of the Budget Calculation form you are filling out.
No. of People	Type in the number of people travelling or use the arrow selector.
Direct	Type the direct cost. This is a dollar amount.
Total Requested Amount	Total requested amount is based on the direct amount. The cash match funds and in-kind match funds are subtracted from the total cost.
Optional Fields	
Cash Match Funds	<p>Type in the amount of cash match funds. This is subtracted from the total requested.</p> <p>This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.</p>
In-Kind Match Funds	<p>Type in the amount of in-kind match funds. This is subtracted from the total requested.</p> <p>This field does not appear if the cash-match, in-kind, and leveraged columns are hidden. This is a dollar amount.</p>

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